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

Table of Contents

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 [Navigator and Exchange Assister 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.
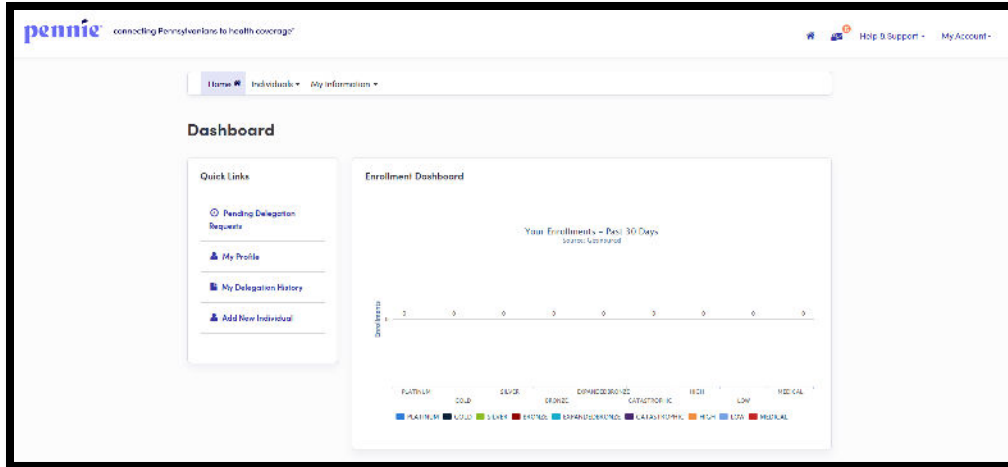
2. Home Page
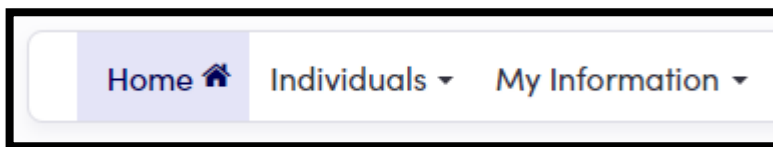
The Enrollment Dashboard is a landing page for the Assister portal. This page shows a count of the Assister enrollments for the past 30-days as distributed across the type of plans selected.

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.
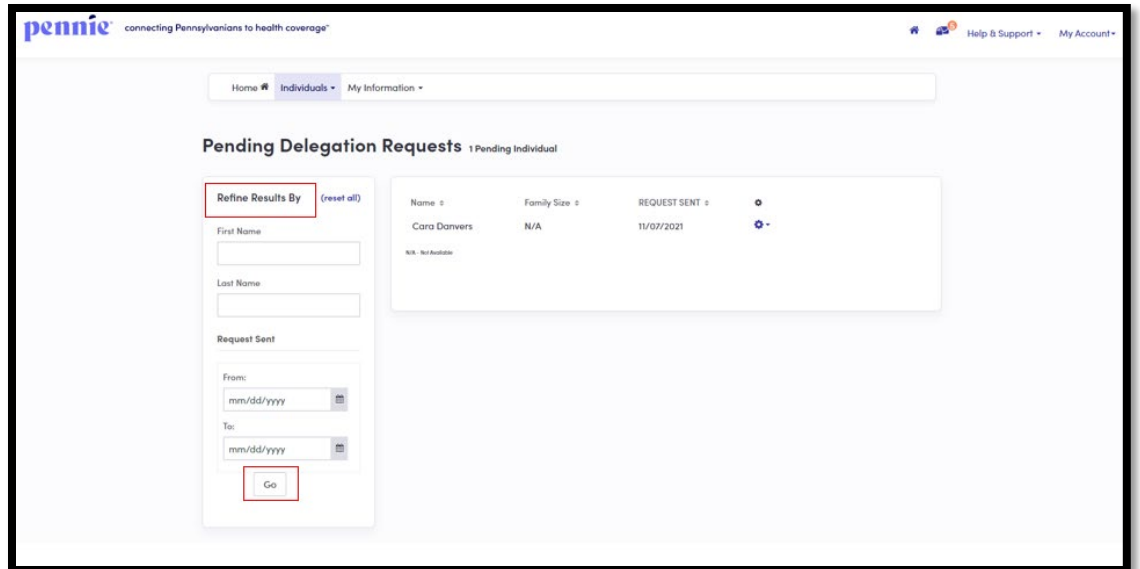
2.1.1 View and search for pending designation requests

- Step-1: Go to 'Home Page' and click on 'Pending Delegation Requests' tab under "Quick Links" section.
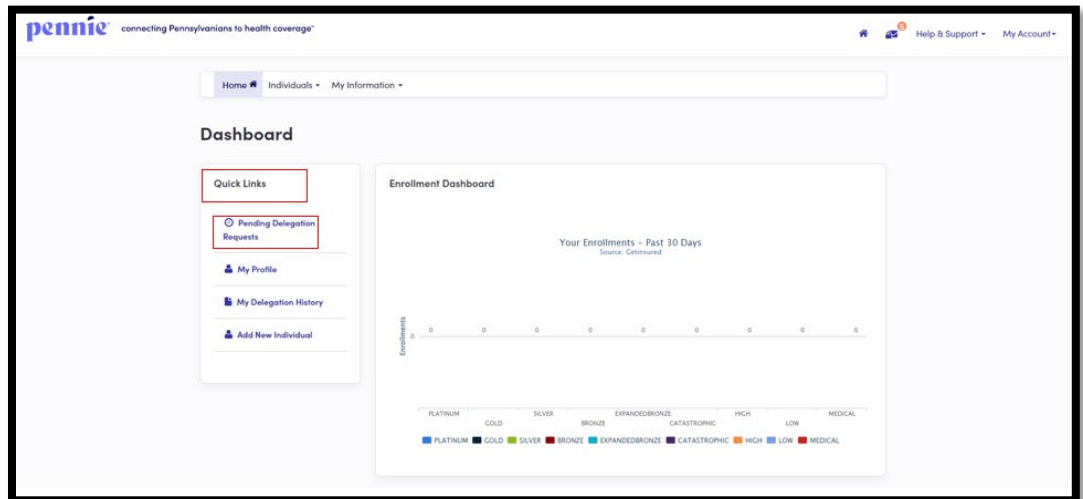
- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range during which an individual sent the designation request in the 'Request Sent' section under the "Refine Results By" section and click on the 'Go' button.
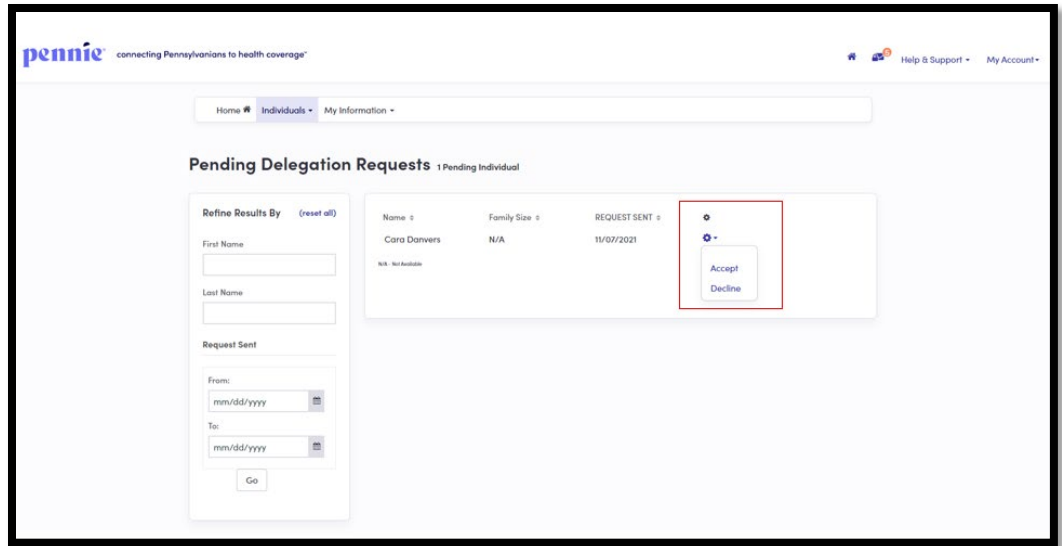
2.1.2 Accept or decline individual designation request

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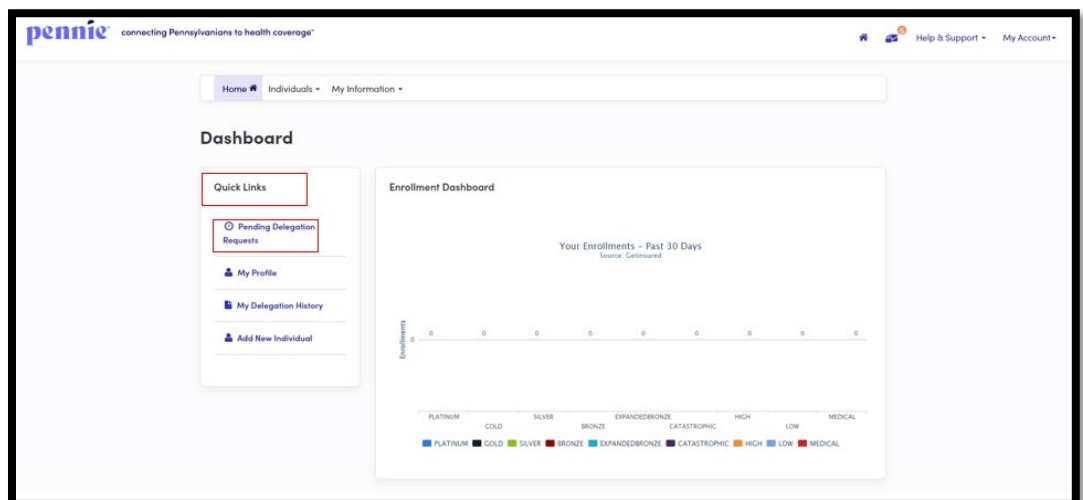

- Step-2: Click on ⚙ ▾ and click on 'Accept' to accept an individual's delegation request or click on 'Decline' to decline the request.

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:"
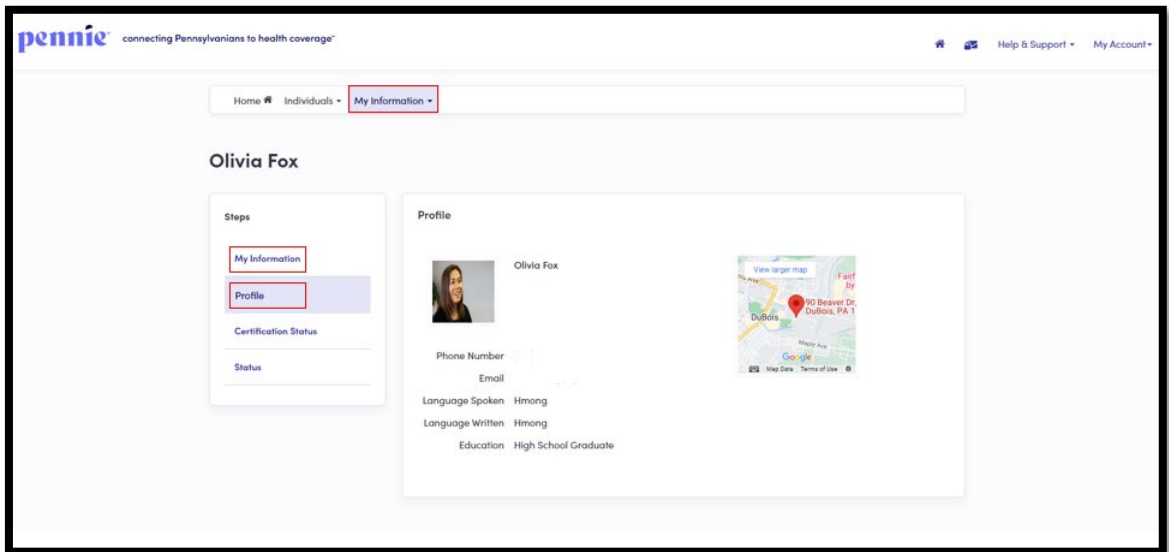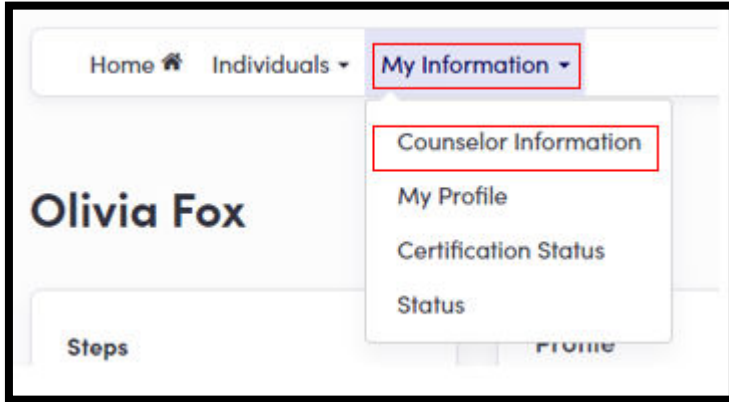
2.2.1 Add or update Assister profile photo

- Step-1: Go to 'Home Page' and click on 'Profile' tab under "Quick Links" section, then select "My Information."
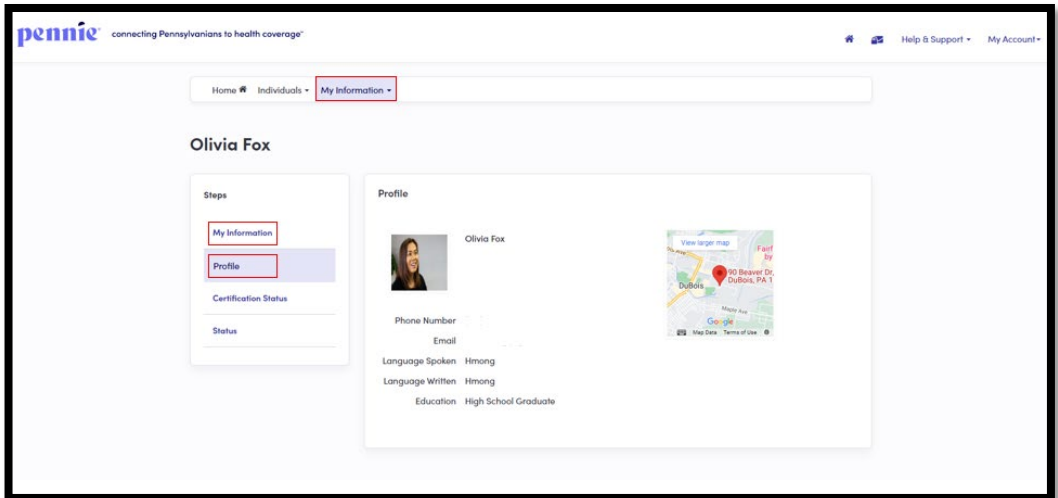
- Step-2: Click on the 'Edit' button.

- Step-3: Click on 'Choose File'.

- 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.

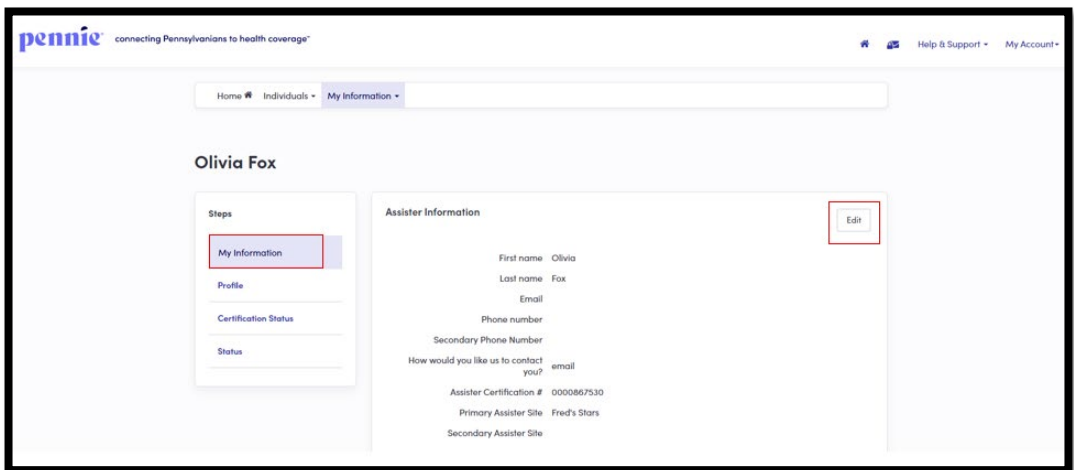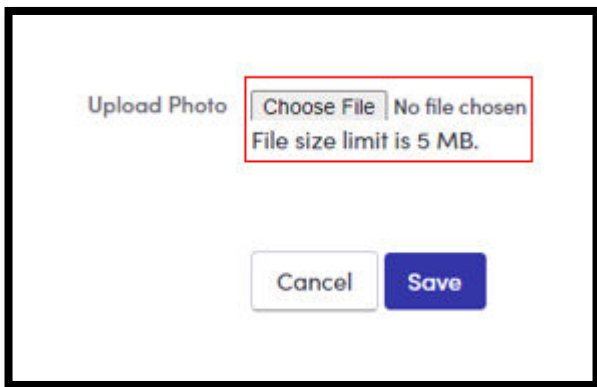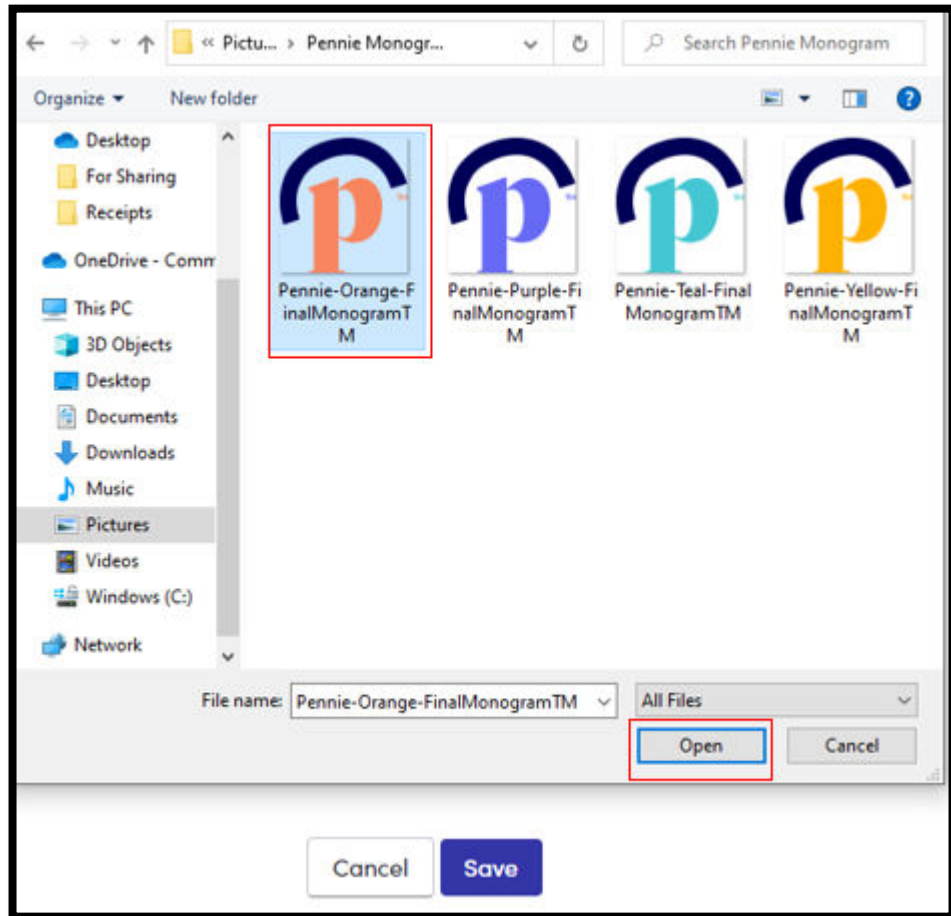- Step-4: Click on the 'Save' button.
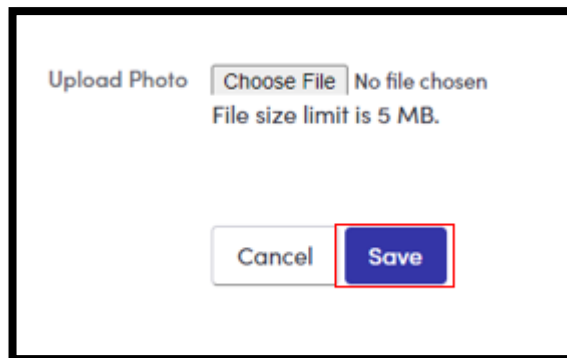
2.2.2 Add or update Assister profile information

- 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:"
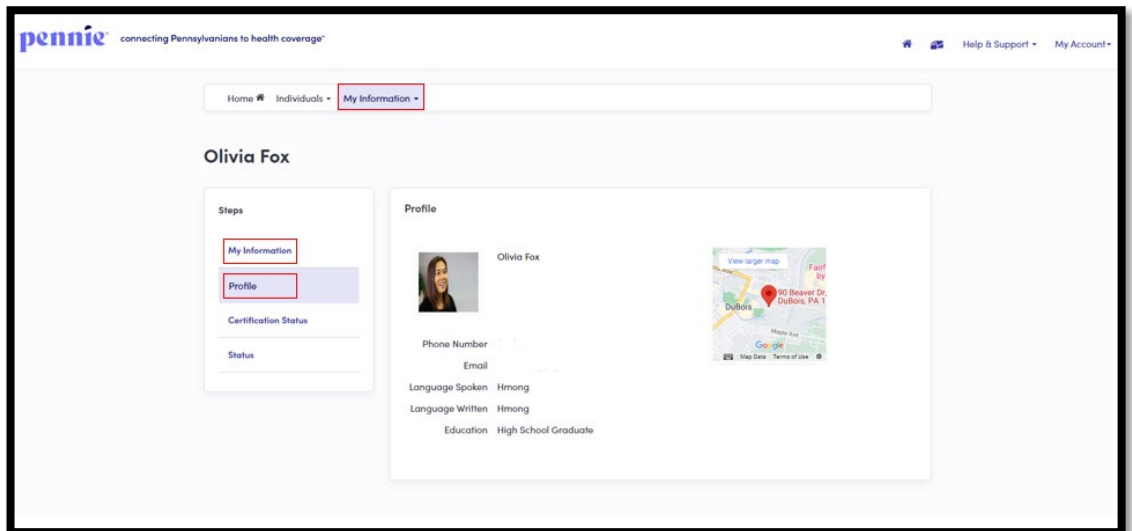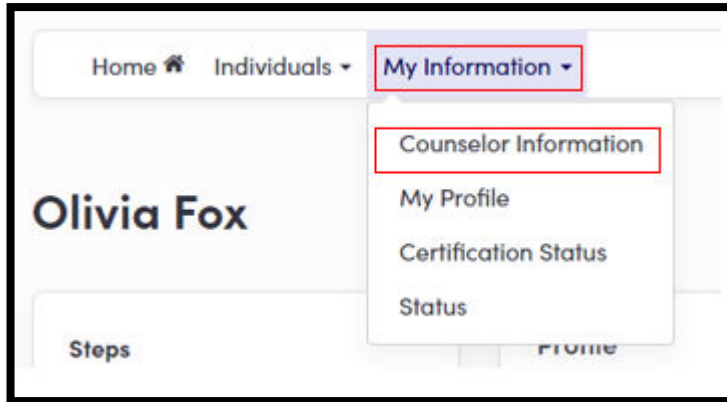
- Step-2: Click on the 'Edit' button.
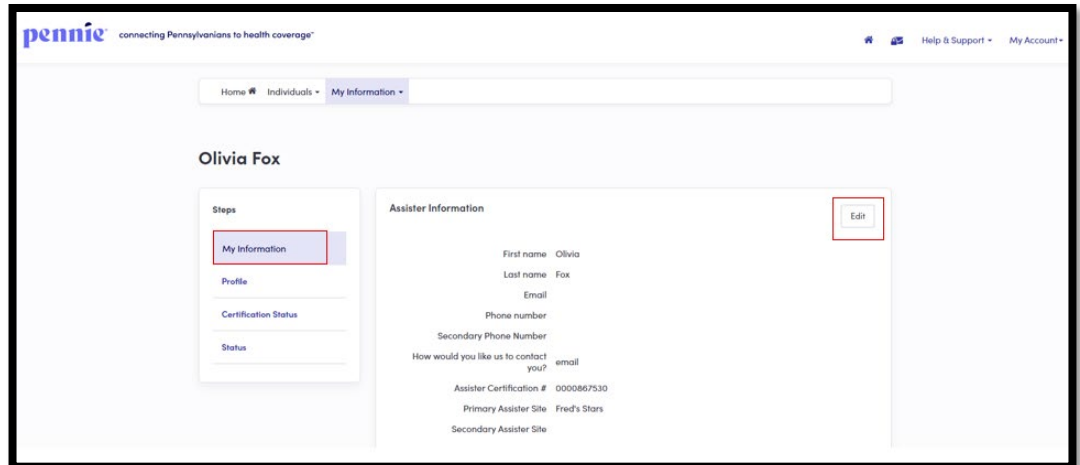
- Step-3: Enter Assister's mailing address and profile information (e.g., "Spoken Languages Supported" or "Written Languages Supported") in the "Mailing Address" section and click on the 'Save' button.

Olivia Fox

Steps

- **My Information**
- Profile
- Certification Status
- Status

Assister Information

First name *	Olivia
Last name *	Fox
Email *	company@email.com
Phone number *	xxx xxx xxxx
Secondary Phone Number	xxx xxx xxxx
How would you like us to contact you? *	● Email ○ Phone ○ Mail
Assister Certification #	0000067530
Primary Assister Site *	Fred's Store ▼
Secondary Assister Site	Select ▼

Mailing Address

Street Address 1 *	Street Name, P.O. Box, Company, c/o
Suite	Apt, Suite, Unit, Bldg, Floor, etc.
City *	City, Town
State *	Pennsylvania ▼
Zip Code	Zip Co

Profile Information

Spoken Languages Supported (Select all that apply) *
- ☐ English
- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ Cantonese
- ☐ Farsi
- ☑ Hmong
- ☐ Korean
- ☐ Mandarin
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Vietnamese
- ☐ Other [Select Same Option]

Written Languages Supported (Select all that apply) *
- ☐ English
- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ Farsi
- ☑ Hmong
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Traditional Chinese character
- ☐ Vietnamese
- ☐ Other [Select Same Option]

|	
Education *	High School Gradu ▼
Upload Photo	[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.
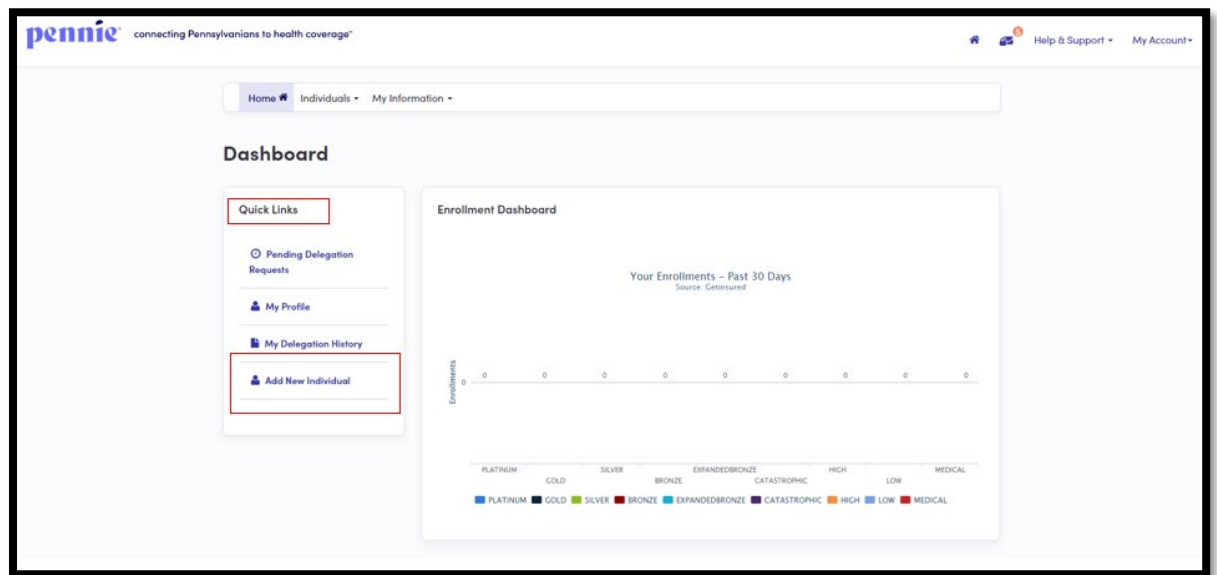
- Step-2: Enter new customer's information (e.g., "First Name" or "Email Address") and click on the 'Start' button.

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

- 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.

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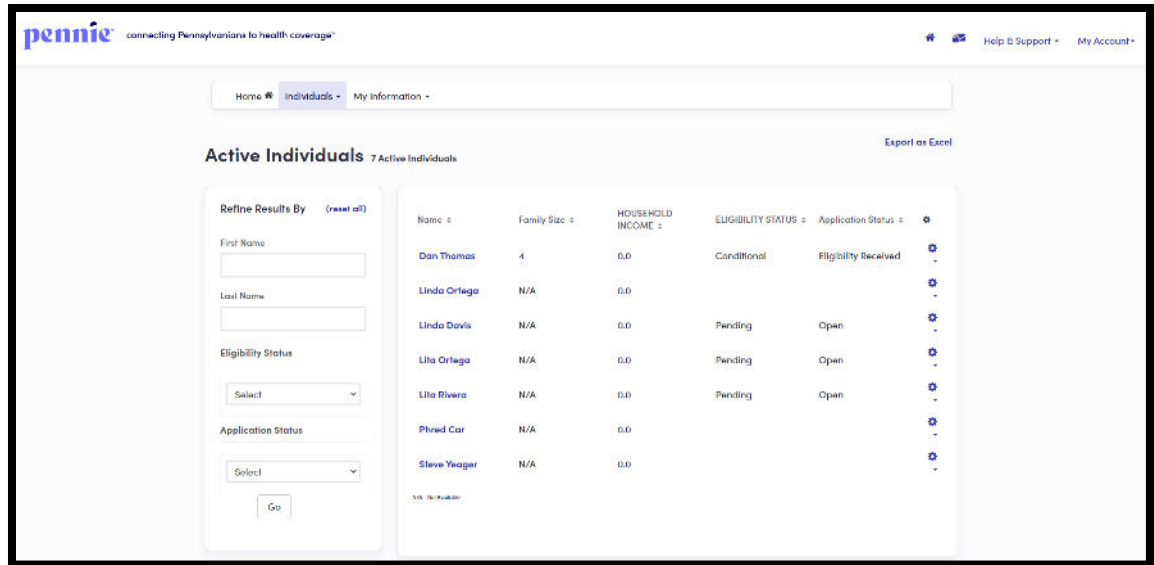
3. Individuals

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.

3.2.1 View and search for active individuals

- Step-1: Click on 'Individuals' tab and select 'Active Customers'.
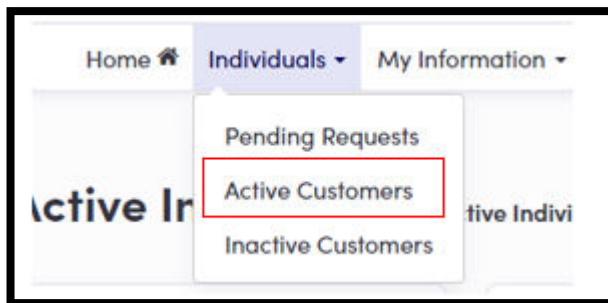
- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list and click on the 'Go' button.
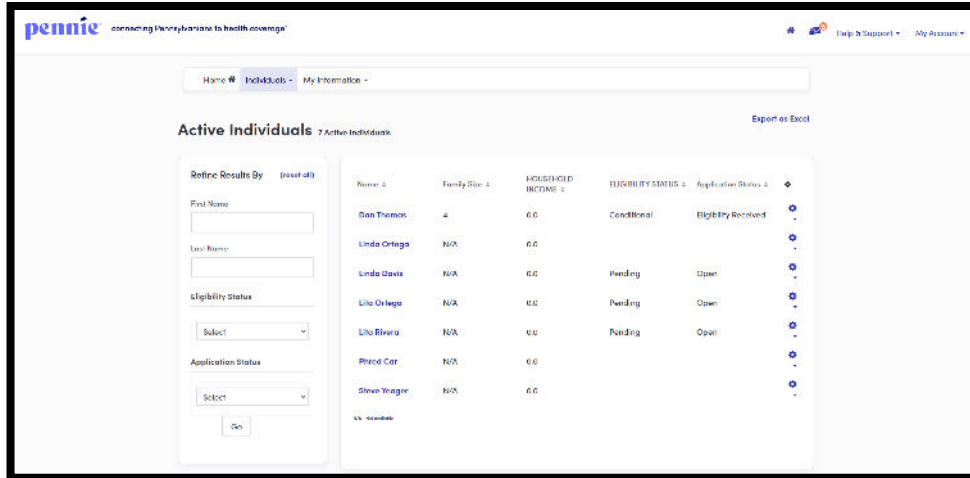
### 3.2.2 Perform actions on a designated customer account

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.

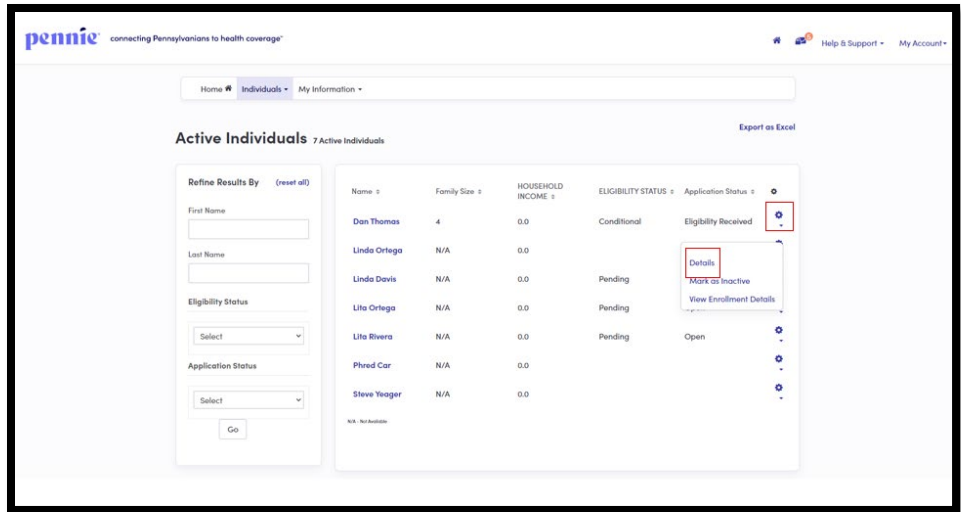### 3.2.2.1 Update individual summary

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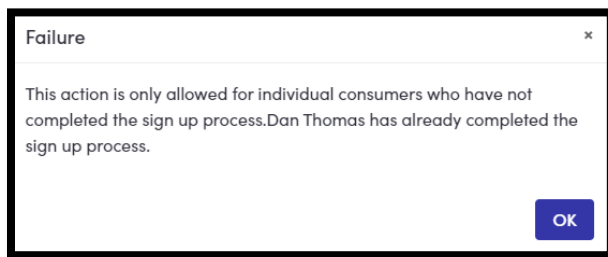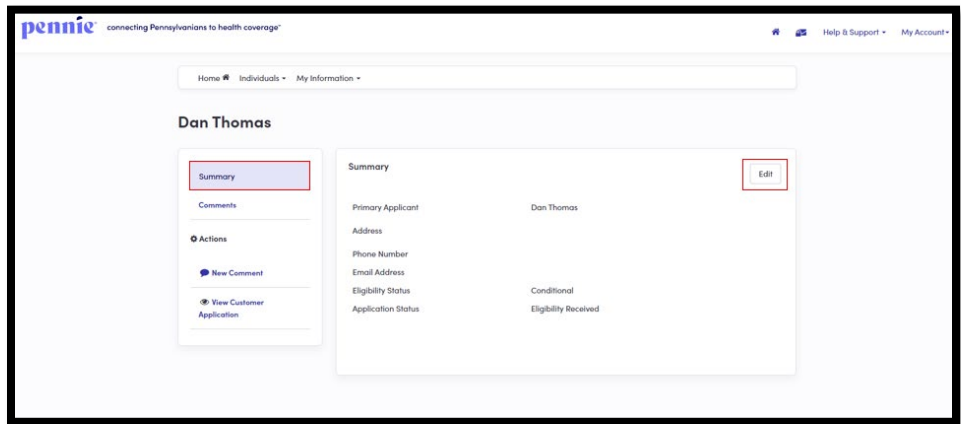

- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.
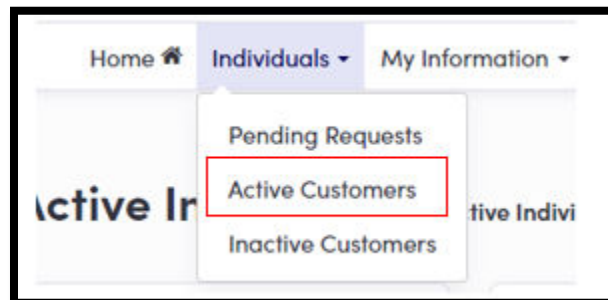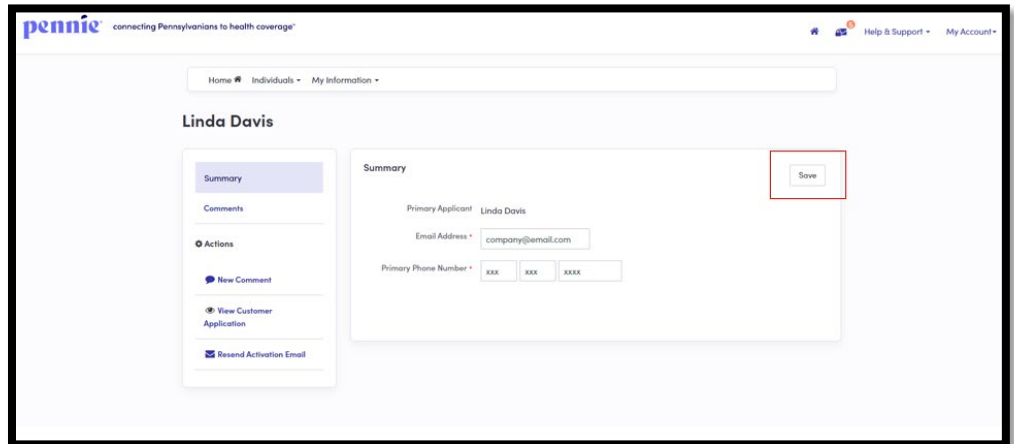
- Step-2: Click on the ⚙▾ button and click on 'Details'.

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

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

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'.

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

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

- 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.

- 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'.
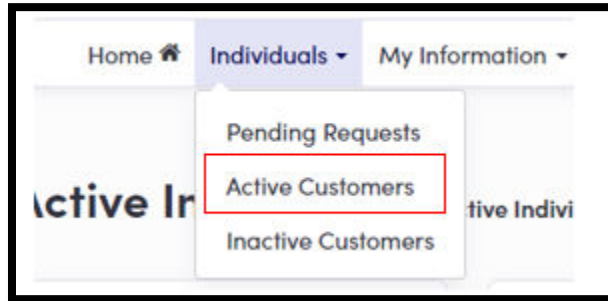
- Step-2: Click on the ⚙▾ button and click on 'Details'.
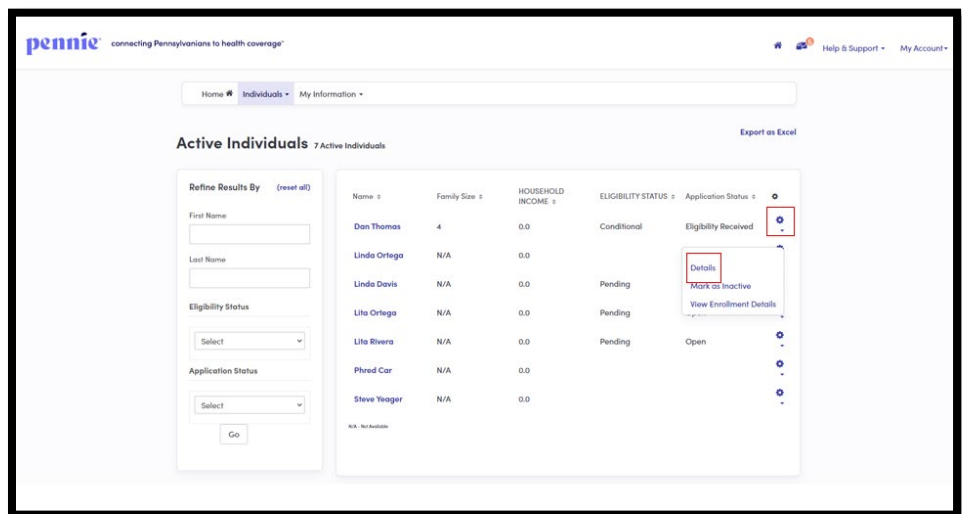
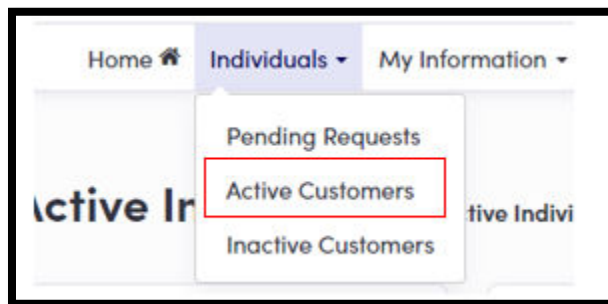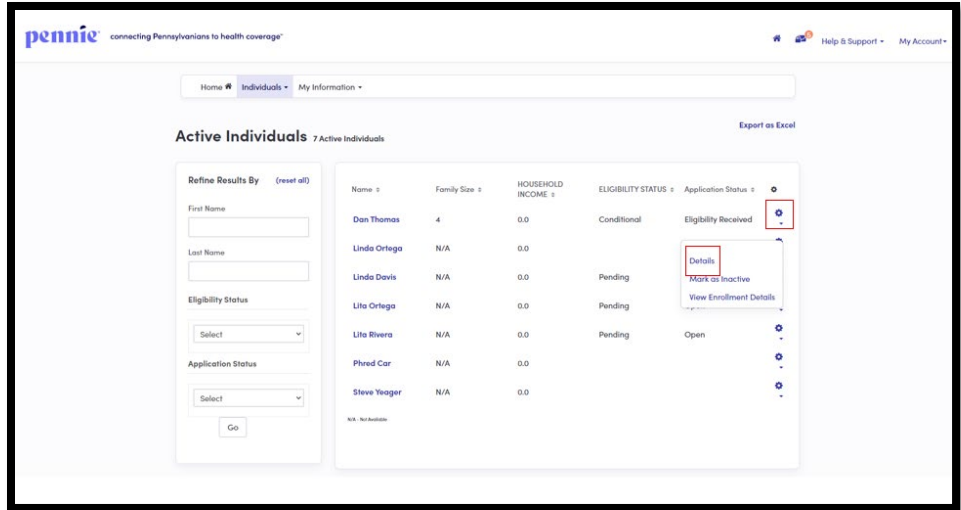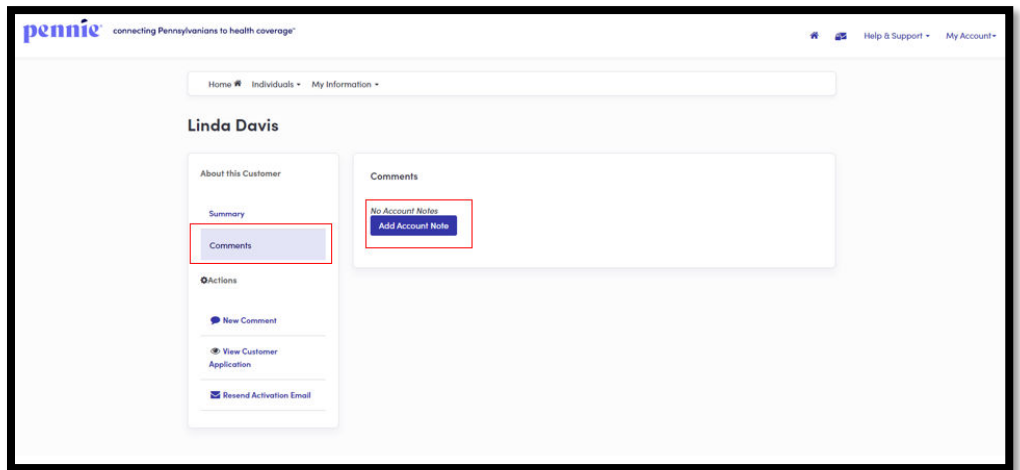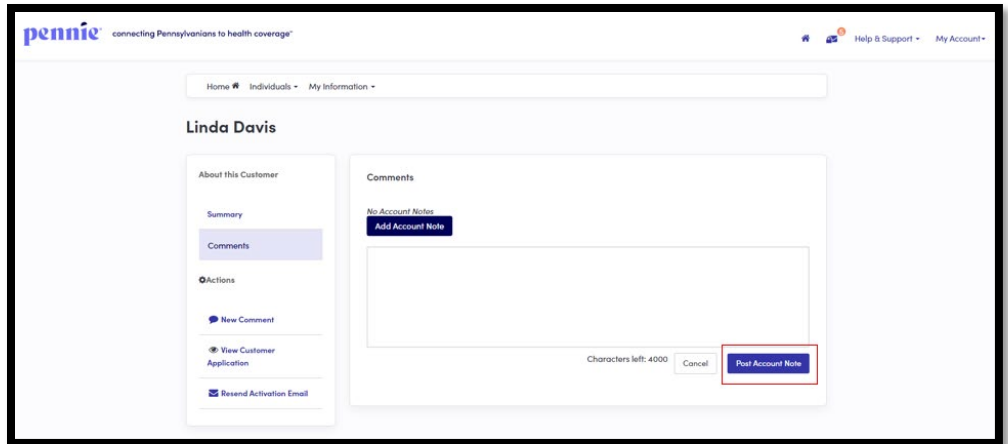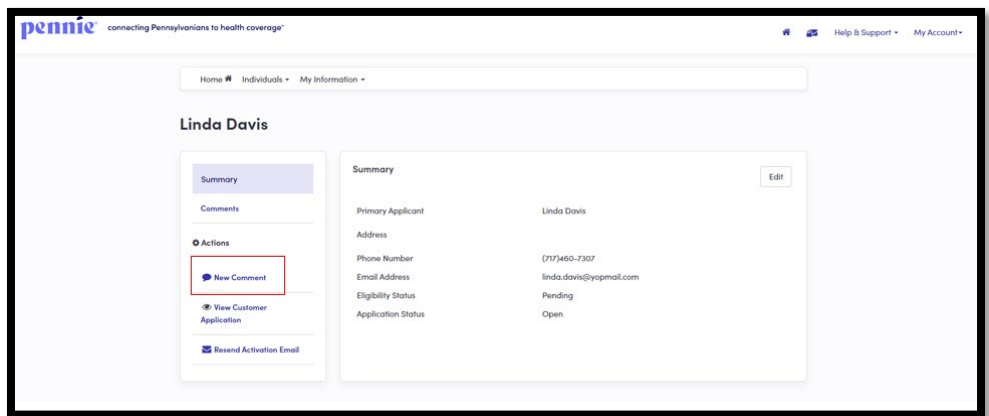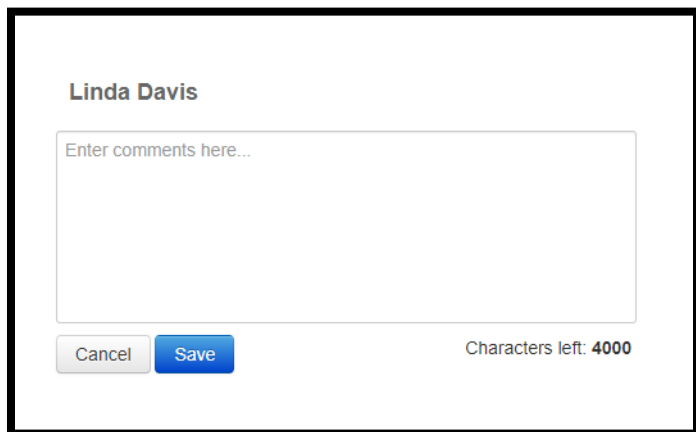- Step-3: Go to "Comments" section and click on the ✏️ button next to a comment.
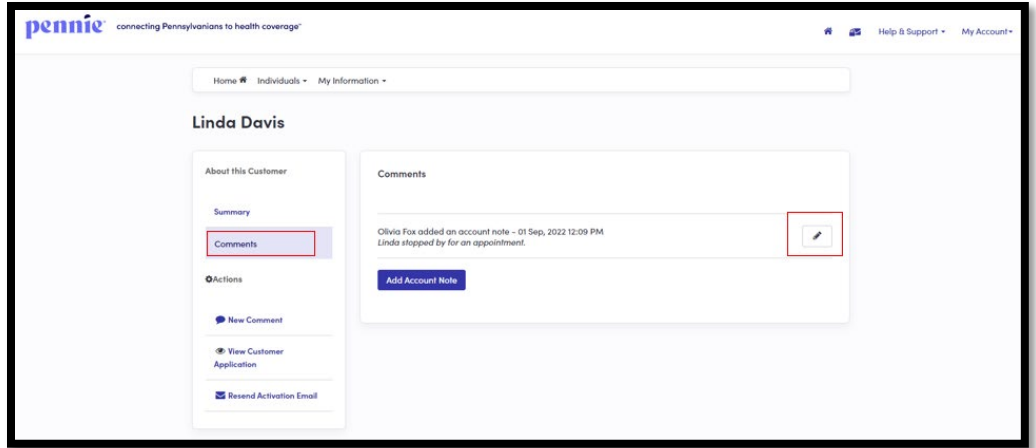
- Step-5: Enter the updated comment in the text area and click on the 'Update Account Note' button.
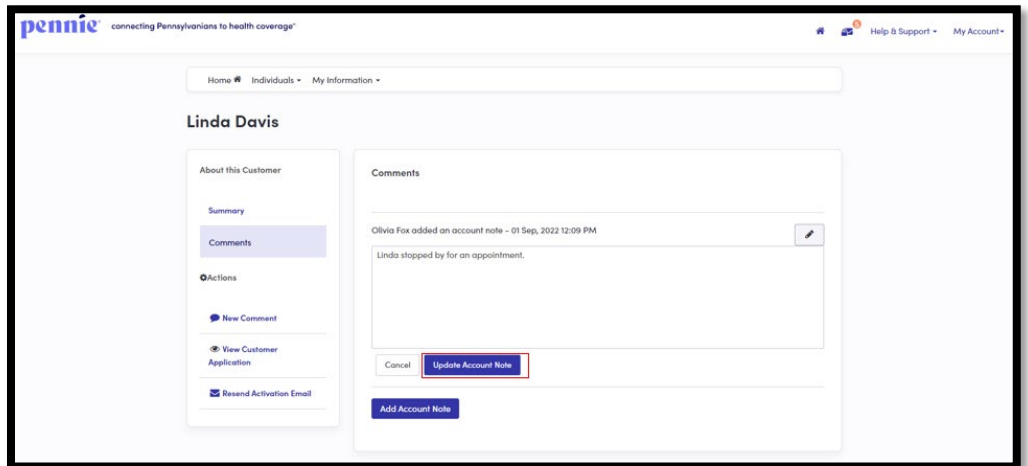
3.2.2.4 View customer application

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-1: Click on 'Individuals' tab and select 'Active Customer'.
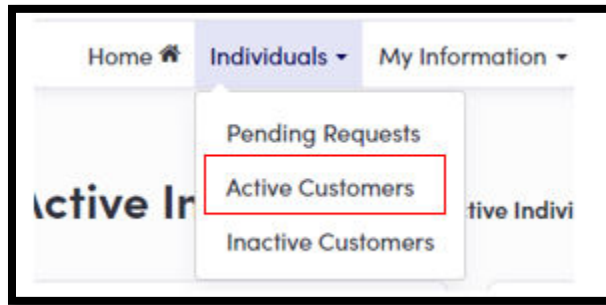
- Step-2: Click on the ⚙ ▾ button and click on 'Details'.
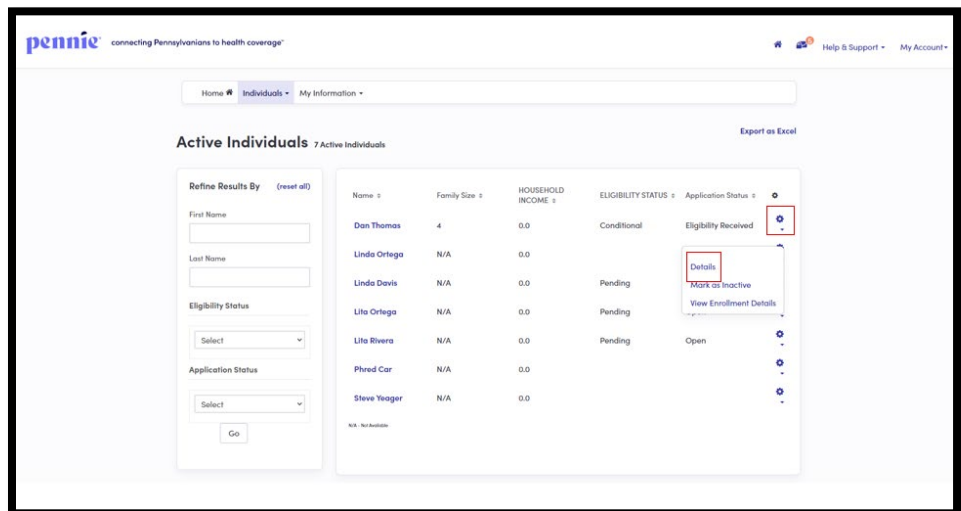
- Step-3: Go to "Actions" section and click on 'View Customer Application'.
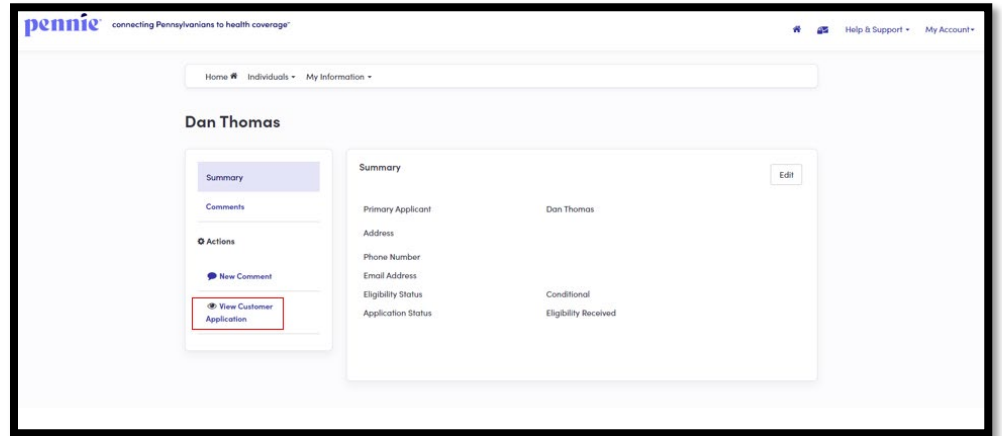
- Step-4: A pop-up box will appear. Click on 'Individual View' to proxy an individual account or click on 'Cancel' to cancel the process.
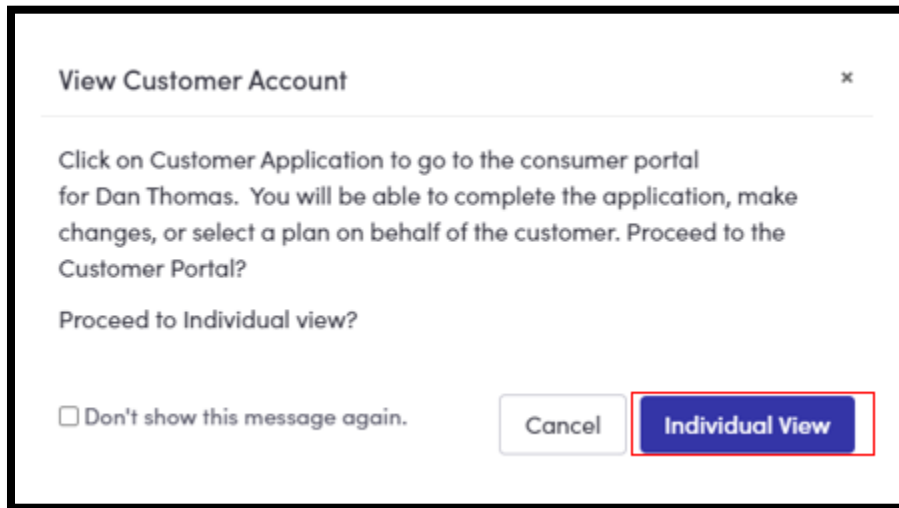
- Step-5: The following screen displays customer account.

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'.
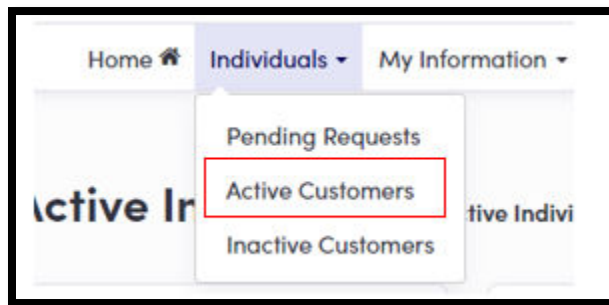
- Step-2: Click on the ⚙▾ button and click on 'Details'.
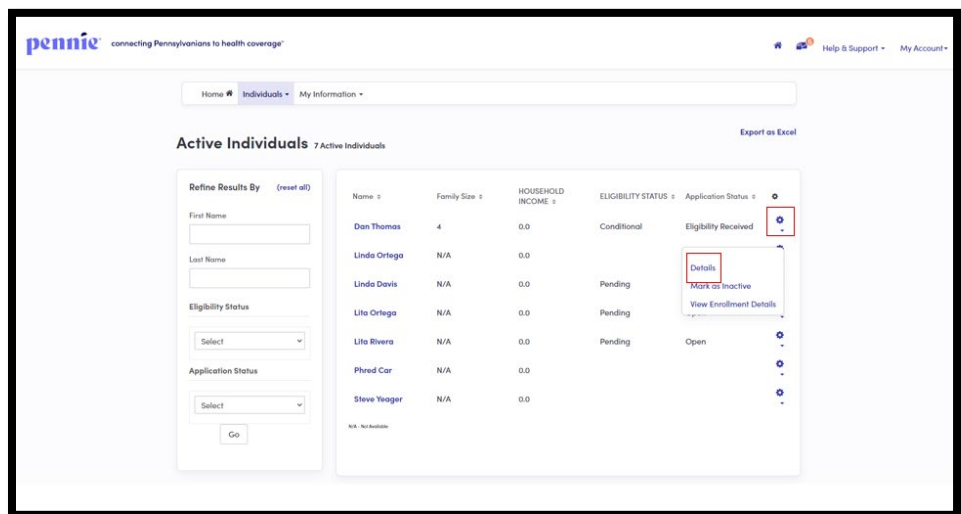
- Step-3: Go to "Actions" section and click on 'Resend Activation Email'.
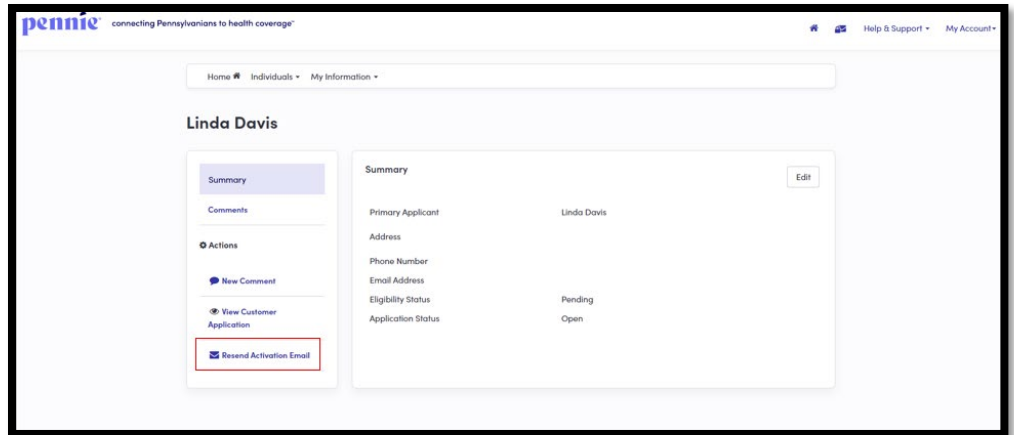
- Step-5: A pop-up screen will appear with a 'Success!' message.
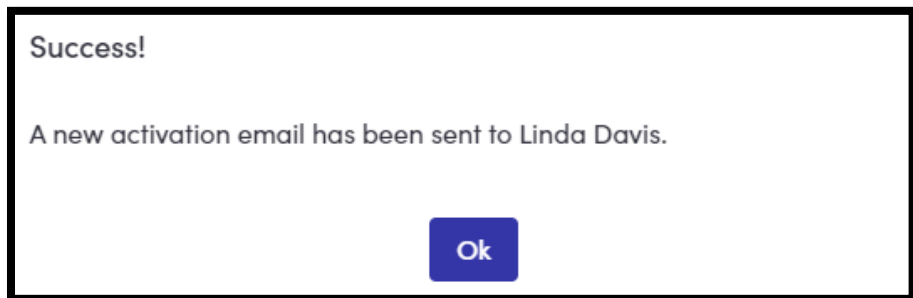
3.2.3 Mark an individual as inactive

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'.
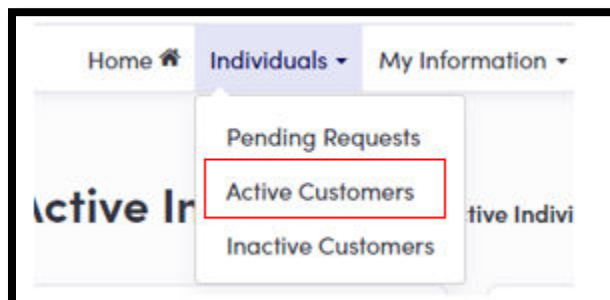
- Step-2: Click on the ⚙ button and click on 'Mark as Inactive'.
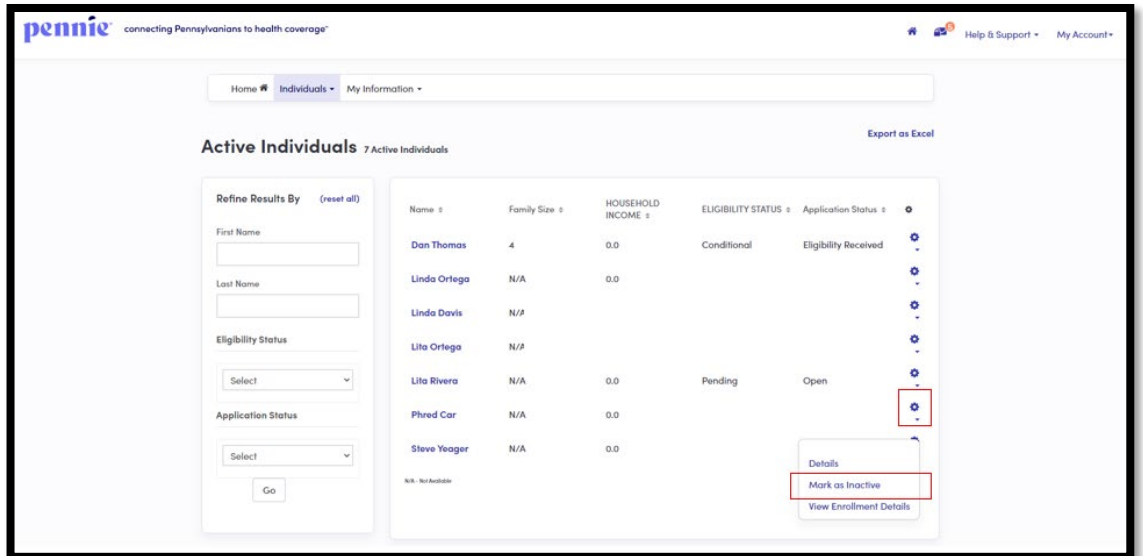
- Step-3: A pop-up screen will appear. Click on 'Confirm' to inactivate a current individual account or click on 'Cancel' to cancel the process.

  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.
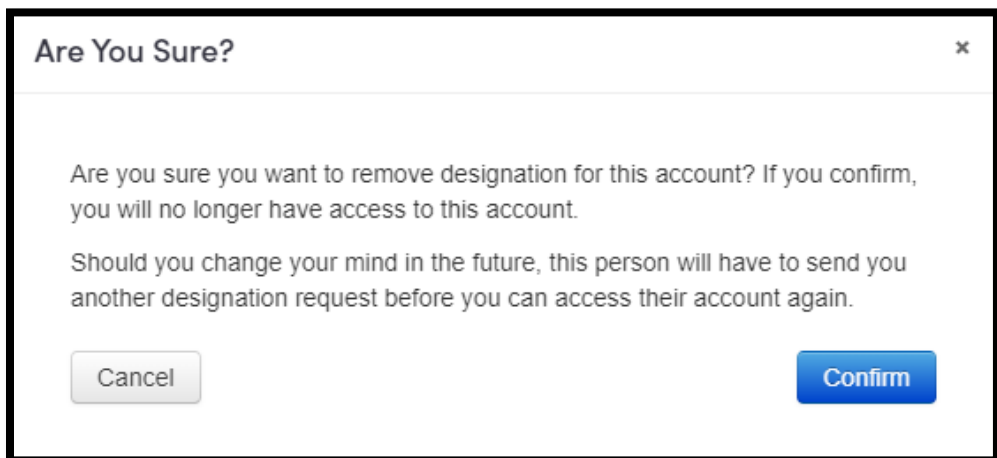
3.3 Inactive Individuals (Undesignated Customers)

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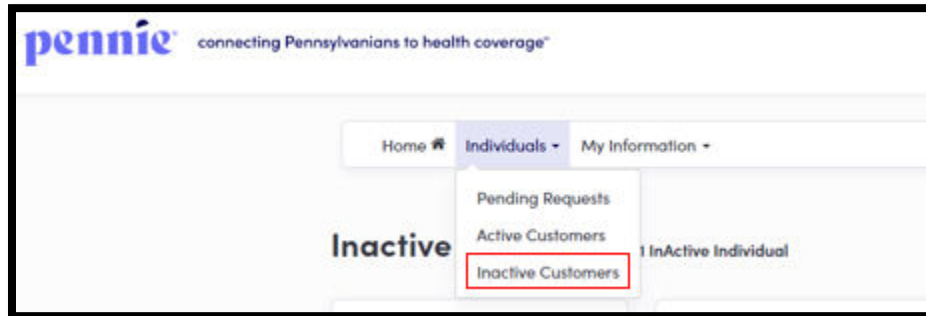
- Step-2: Enter the individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range an individual account has been inactive in the 'Inactive Since' section under the "Refine Results By" section and click on the 'Go' button.
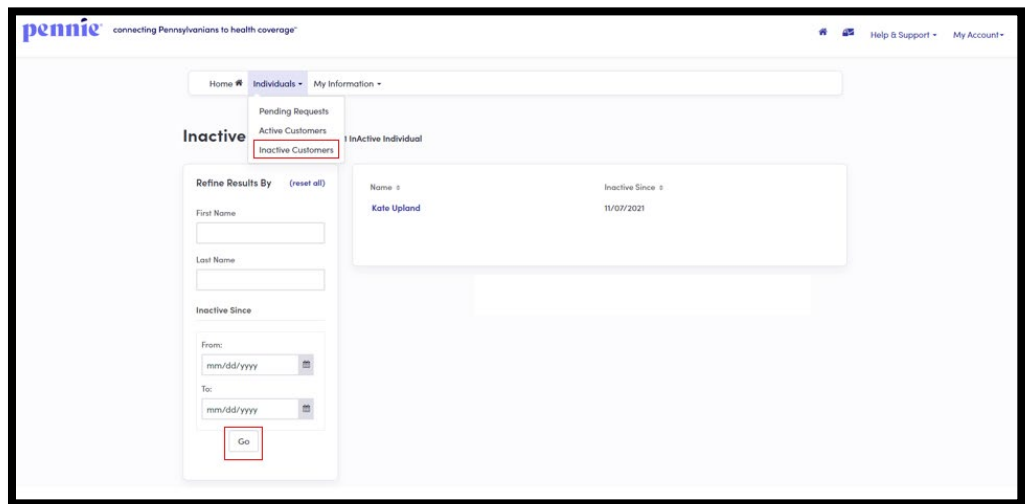
4. My Information
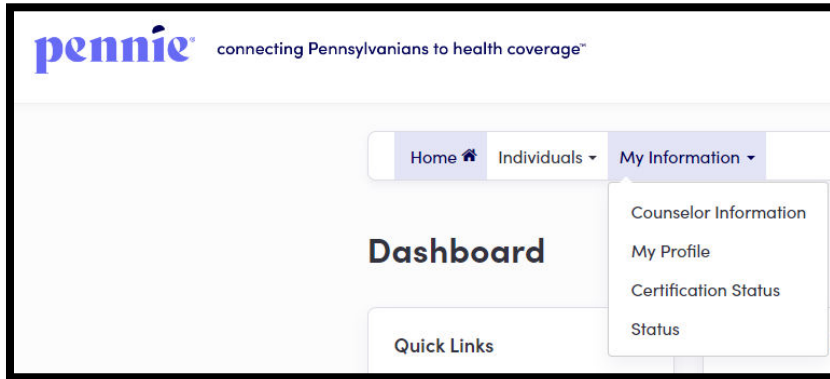
4.1 Assister Information

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'.
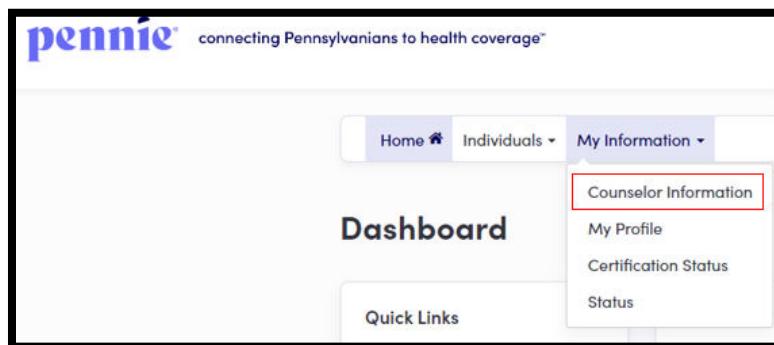
- Step-2: Click on the 'Edit' button.
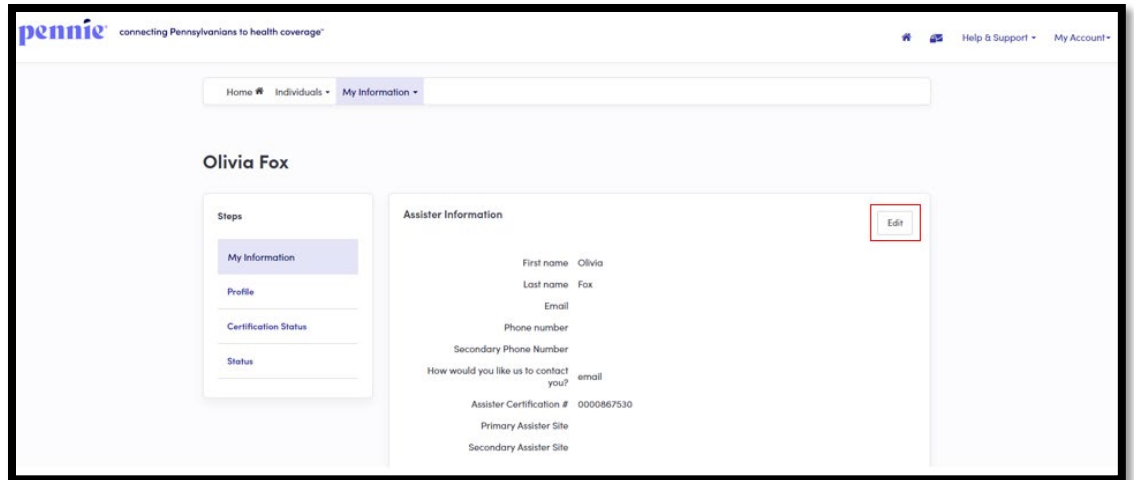
- Step-3: Enter Assister Information (e.g., "First Name" or "Phone Number"), Mailing Address and Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported") and click on the 'Save' button.

Olivia Fox

Steps

- **My Information**
- Profile
- Certification Status
- Status

Assister Information

First name *	Olivia
Last name *	Fox
Email *	company@email.com
Phone number *	xxx xxx xxxx
Secondary Phone Number	xxx xxx xxxx
How would you like us to contact you? *	◉ Email ◯ Phone ◯ Mail
Assister Certification #	0000667530
Primary Assister Site *	Fred's Store ▼
Secondary Assister Site	Select ▼

Mailing Address

Street Address 1 *	Street Name, P.O. Box, Company, c/o
Suite	Apt, Suite, Unit, Bldg, Floor, etc.
City *	City, Town
State *	Pennsylvania ▼
Zip Code	Zip Co

Profile Information

Spoken Languages Supported (Select all that apply) *
- ☐ English
- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ Cantonese
- ☐ Farsi
- ☑ Hmong
- ☐ Korean
- ☐ Mandarin
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Vietnamese
- ☐ Other [Select Same Options]

Written Languages Supported (Select all that apply) *
- ☐ English
- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ Farsi
- ☑ Hmong
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Traditional Chinese character
- ☐ Vietnamese
- ☐ Other [Select Same Options]

Education *	High School Gradu ▼
Upload Photo	Choose File No file chosen File size limit is 5 MB.

[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.
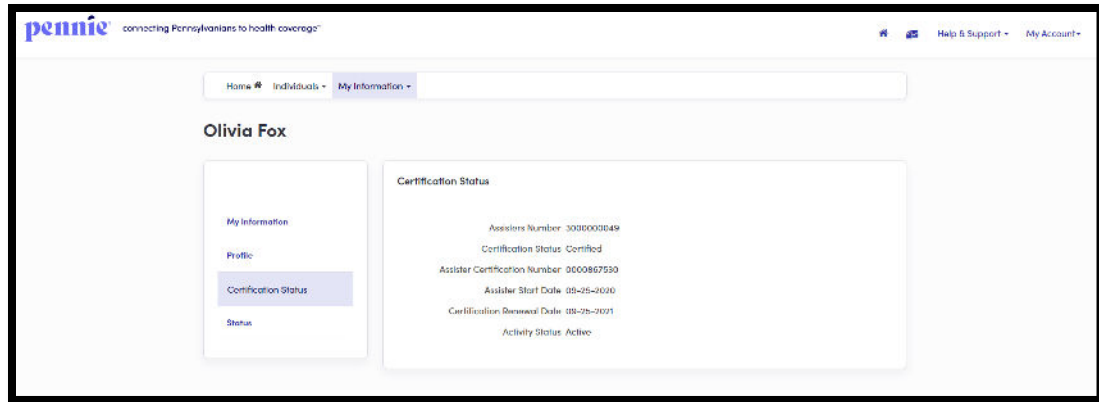
Document Revision History

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