



Entity User Reference Manual

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Version 2.0

Commonwealth of Pennsylvania

Pennsylvania Health Insurance Exchange Authority d/b/a Pennie

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Harrisburg, PA 17101

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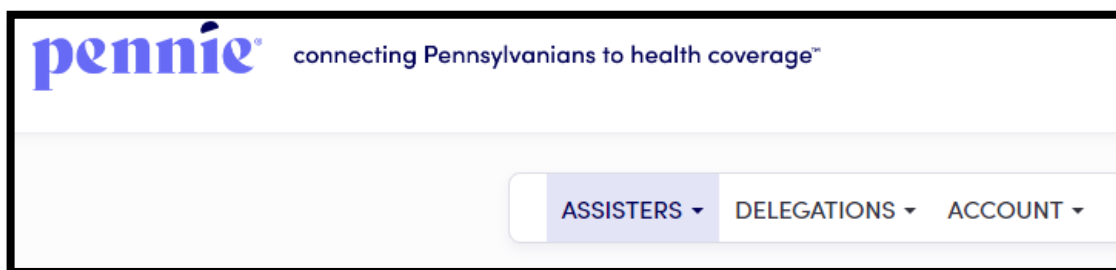
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1. Overview

This manual is intended to provide a detailed description of the functions available through the Entity Portal of the Pennie Platform. “Entity” refers collectively to the health insurance Assister organizations that offer enrollment assistance to Pennsylvania’s customers. Throughout this document, Assister organizations are referred to as “Entities or Entity.”

The Entity Portal is a complete solution to add/manage Assistors of the organization, submit applications and enrollments and perform account maintenance transactions on behalf of the Assistors for the existing customers, change customer designation from one Assister to another within the organization, perform account maintenance for the organization, and manage organization’s and Assister’s book of business.

2. Home Page



The Home Page is the landing page for Entity organization. This section displays the list of Assistors associated with the Entity organization, allows the Entity to add new Assistors, view and search for Assistors associated with the organization, and edit Assister information.

2.1 Add Assister

This section allows the Entity to add Assistors for the Entity organization who will assist and perform actions on behalf of the customers.

PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assistors will not receive the invitation email to claim their account until the Assister Administrator (Admin) has updated their certification status to “Certified.”

2.1.1 Add New Assister

- Step-1: Click on the ‘Add Assister’ button on the home page.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Assisters 4 Matching Assisters

Refine Results By (reset all)

Assisters' First Name

Assisters' Last Name

Status

☐ Active

☐ Inactive

Certification Status

Select ▾

Name	Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS	
Dan Star	0		Active	Pending	⚙
Olivia Fox	8	09/25/2021	Active	Certified	⚙
Penny Greenfield	0	03/24/2022	InActive	Certified	⚙
Sam Garvey	5	09/16/2021	Active	Certified	⚙

Add Assister

- Step-2: Fill out New Assister Form (e.g., “First Name” or “Primary Phone Number”), enter the Mailing Address, Profile Information (e.g., “Spoken Languages Supported” or “Written Languages Supported” or “Education”) and click on the ‘Save’ button.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Add Assister

New Assister Form

First Name *

Last Name *

Email * Enter assister's email for account activation

Phone number * Enter assister's cell number for account activation

Secondary Phone Number

How would you like us to contact you?

☐ Email

☒ Phone

☐ Mail

Primary Assister Site *

Secondary Assister Site *

Mailing Address

Street Address *	<input type="text" value="Street Name, P.O. Box, Company, c/o"/>
Suite	<input type="text" value="Apt, Suite, Unit, Bldg, Floor, etc"/>
City *	<input type="text" value="City, Town"/>
State *	<input type="text" value="Select"/>
Zip Code *	<input type="text"/>

Profile Information

Spoken Languages Supported (Select all that apply) *	<input type="checkbox"/> Arabic
	<input type="checkbox"/> Armenian
	<input type="checkbox"/> Cambodian
	<input type="checkbox"/> Cantonese
	<input type="checkbox"/> English
	<input type="checkbox"/> Farsi
	<input type="checkbox"/> Hmong
	<input type="checkbox"/> Korean
	<input type="checkbox"/> Mandarin
	<input type="checkbox"/> Russian
	<input type="checkbox"/> Spanish
	<input type="checkbox"/> Tagalog
	<input type="checkbox"/> Vietnamese
	<input type="checkbox"/> Other <input type="text" value="Select Some Options"/>

Written Languages Supported (Select all that apply) *

- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ English
- ☐ Farsi
- ☐ Hmong
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Traditional Chinese character
- ☐ Vietnamese
- ☐ Other

Education *

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

View and Search for Assisters

- Step-1: Go to Entity portal 'Home Page'.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Assisters 4 Matching Assisters

Refine Results By (reset all)

Assisters' First Name

Assisters' Last Name

Status

☐ Active

☐ Inactive

Name ▾	Number Of Clients ▾	Certification renewal for Assister ▾	STATUS ▾	CERTIFICATION STATUS ▾	
Dan Star	0		Active	Pending	
Olivia Fox	8	09/25/2021	Active	Certified	
Penny Greenfield	0	03/24/2022	InActive	Certified	
Sam Garvey	5	09/16/2021	Active	Certified	

- Step-2: Search Assistors by entering Assister's first name in the 'Certified Assister first name' field; last name in the 'Certified Assister last name' field; select Assister activity status from the 'Active' or 'Inactive' status; select Assister certification status from the 'Certification Status' drop-down list (e.g., "Pending" or "Certified"); or select a desired date range during which the Assister's certification will be renewed from the 'Certification Assister Renewal Date' section under "Refine Results By" section. Click on the 'Go' button.

Assistors 4 Matching Assistors Add Assister

Refine Results By (reset all)

Assistors' First Name

Assistors' Last Name

Status
☐ Active
☐ Inactive

Certification Status
 Select

Assister Certification Renewal Date
 From
 To

Go

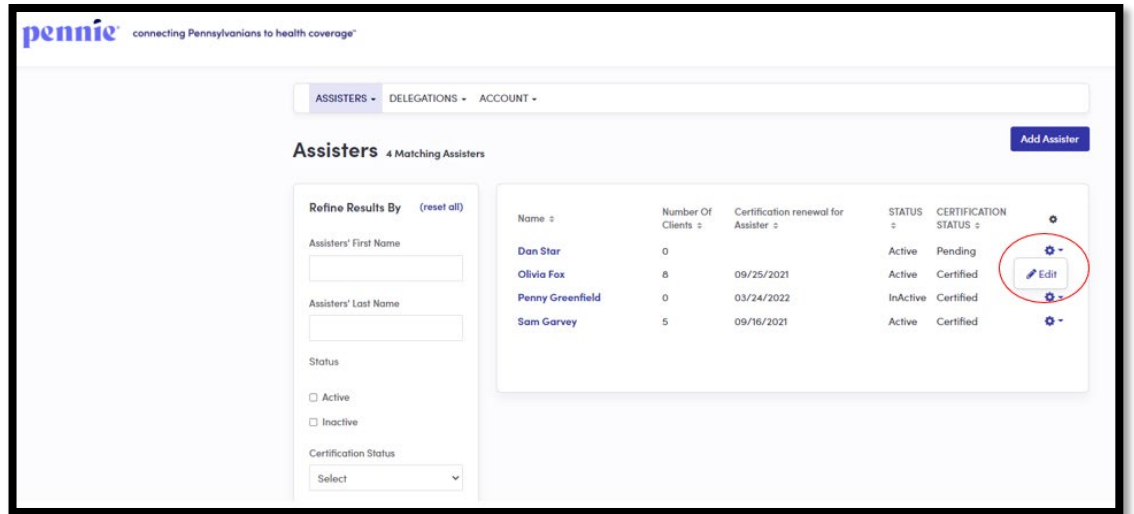
Name	Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS	
Dan Star	0		Active	Pending	
Olivia Fox	6	09/25/2021	Active	Certified	
Penny Greenfield	0	03/24/2022	InActive	Certified	
Sam Garvey	5	09/16/2021	Active	Certified	

2.2 Edit Assister Information

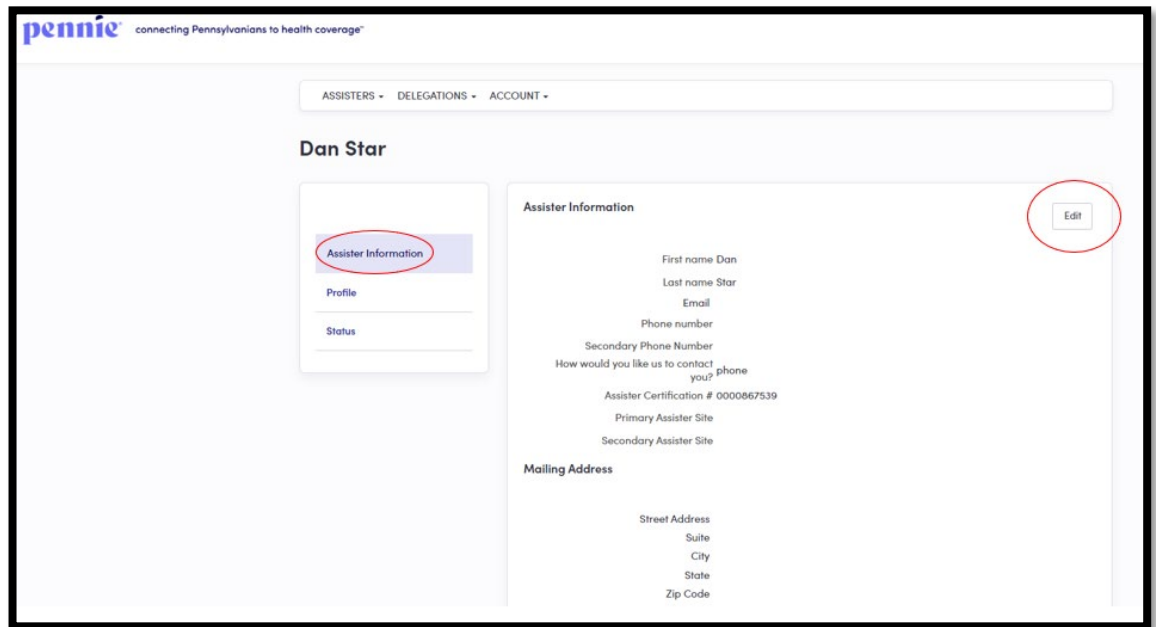
The Edit Assister information section helps the Entity in managing the Assister information, view Assister profile, and update the Assister activity status.

2.2.1 Add or update Certified Assister information

- Step-1: Click on and click on the 'Edit' button on the home page.



- Step-2: Click on the “Assister Information” section and click on ‘Edit’ button.



Step-3: Enter the 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.

Dan Star

Assistant Information

Profile

Status

Assistant Information

First name

Last name

Email

Phone number

Secondary Phone Number

How would you like us to contact you?

☐ Email

☒ Phone

☐ Mail

Primary Assistant Site

Secondary Assistant Site

Mailing Address

Street Address

Suite

City

State

Zip Code

Profile Information

Spoken Languages Supported (Select all that apply)

☐ English

☒ Arabic

☐ Armenian

☐ Cambodian

☐ Cantonese

☐ Farsi

☐ Hmong

☐ Korean

☐ Mandarin

☐ Russian

☐ Spanish

☐ Tagalog

☐ Vietnamese

☐ Other

Written Languages Supported (Select all that apply)

☒ English

☐ Arabic

☐ Armenian

☐ Cambodian

☐ Farsi

☐ Hmong

☐ Korean

☐ Russian

☐ Spanish

☐ Tagalog

☐ Traditional Chinese character


☐ Vietnamese

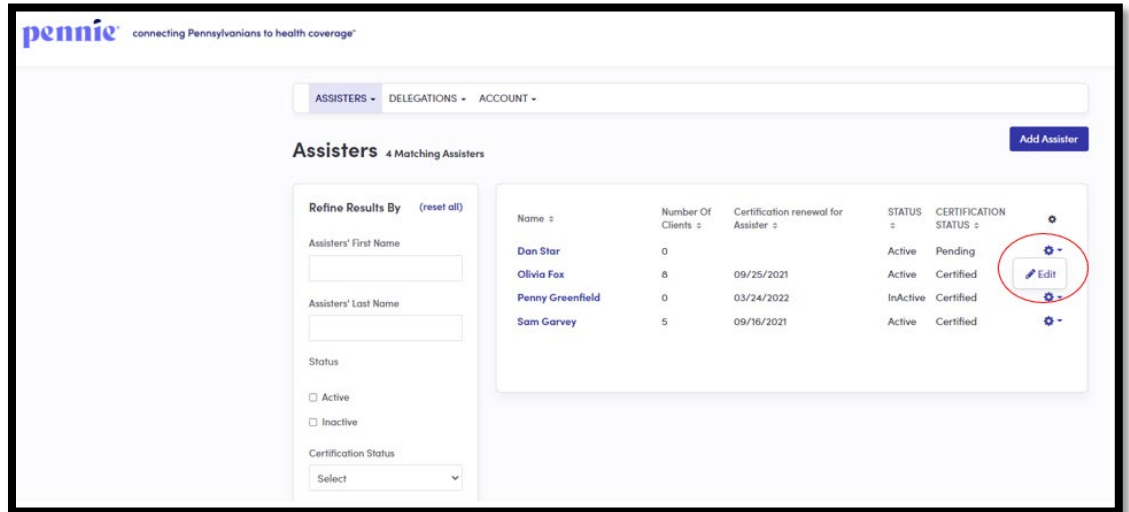
☐ Other

Education

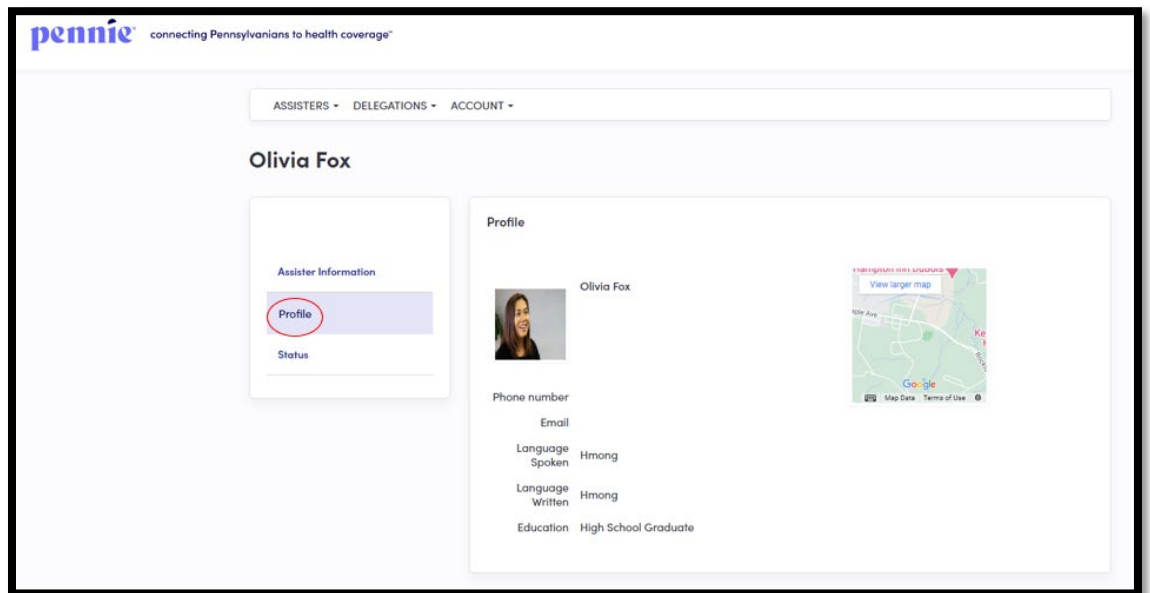
Upload Photo No file chosen
File size limit is 5 MB.

2.2.2 View Certified Assister profile


- Step-1: Click on  and click on the 'Edit' button on the home page.

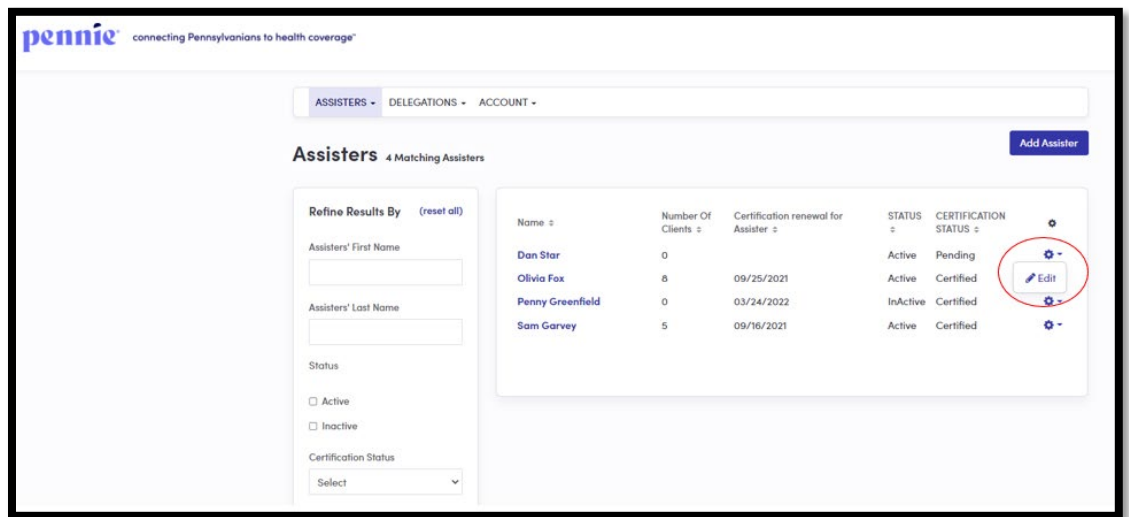


- Step-2: Click on the "Profile" section and the following screen will display the Assister's profile information.

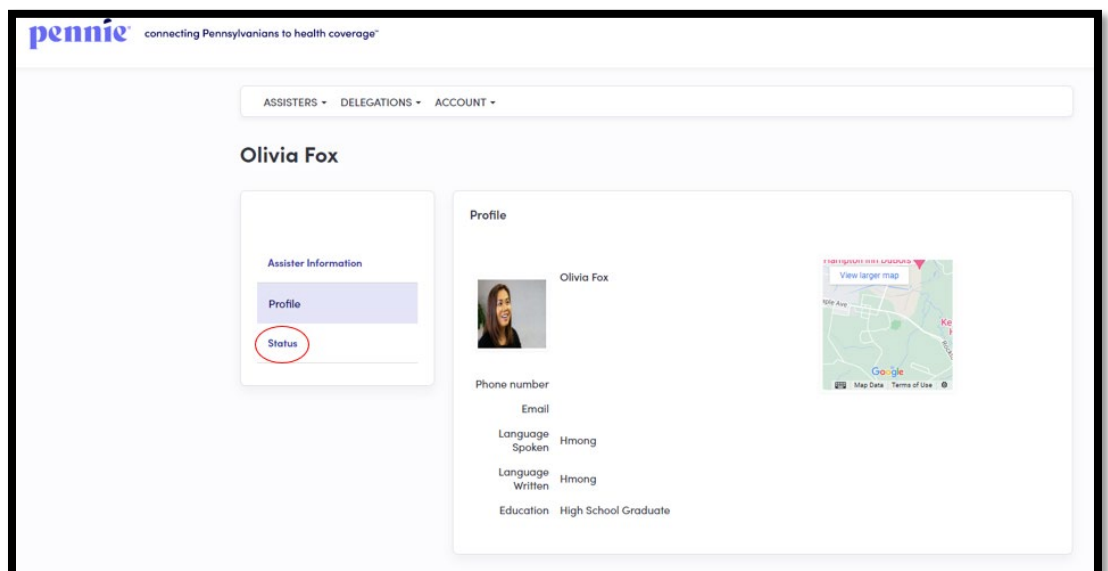


2.2.3 Update Certified Assister activity status

- Step-1: Click on  and click on the 'Edit' button on the home page.



- Step-2: Click on the "Status" section and click on 'Edit' button.



- Step-3: Select a new Assister activity status (e.g., “Active” or “Inactive”) from the ‘New Status’ drop-down list and provide comments in the ‘Comment’ section and click on the ‘Save’ button.

PLEASE NOTE: The Assister must be in “Active” activity status in order to appear in the “Find Local Assistance” directory tool and appear in the Assister search list while the Entity is changing Customer delegation from one Assister to another Assister within the Entity Organization.

Olivia Fox

Steps

- 1. Entity Information
- 2. Populations Served
- 3. Locations and Hours
- 4. Contact Information
- ✓ **Assisters**
- 6. Document Upload
- 7. Payment Information

Status

Status: Active

View the status of your certification application here. You can also see the history of previous actions related to your status.

Assister History

Date	Previous status	New Status	View Comment
03/08/2021	InActive	Active	No Comments
10/02/2020	Active	InActive	No Comments
09/25/2020	InActive	Active	No Comments

Olivia Fox

Assister Information

Profile

Status

Status

Status: Active

New Status: Select

Comment:

Cancel Save

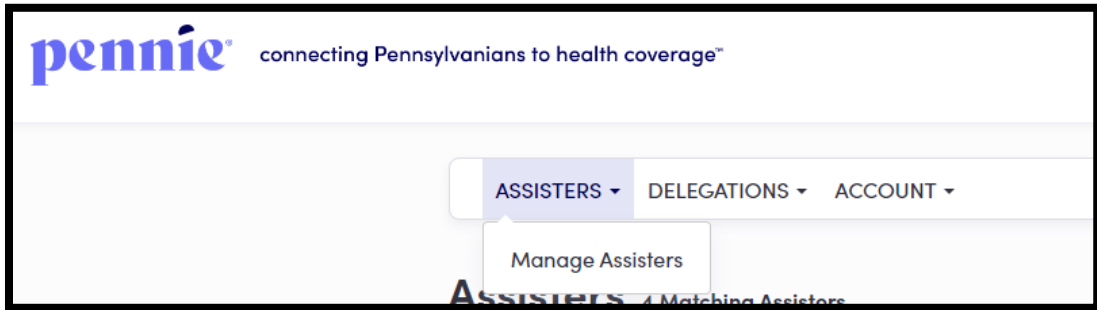
Assister History

Date	Previous status	New Status	View Comment
03/08/2021	InActive	Active	No Comments
10/02/2020	Active	InActive	No Comments
09/25/2020	InActive	Active	No Comments

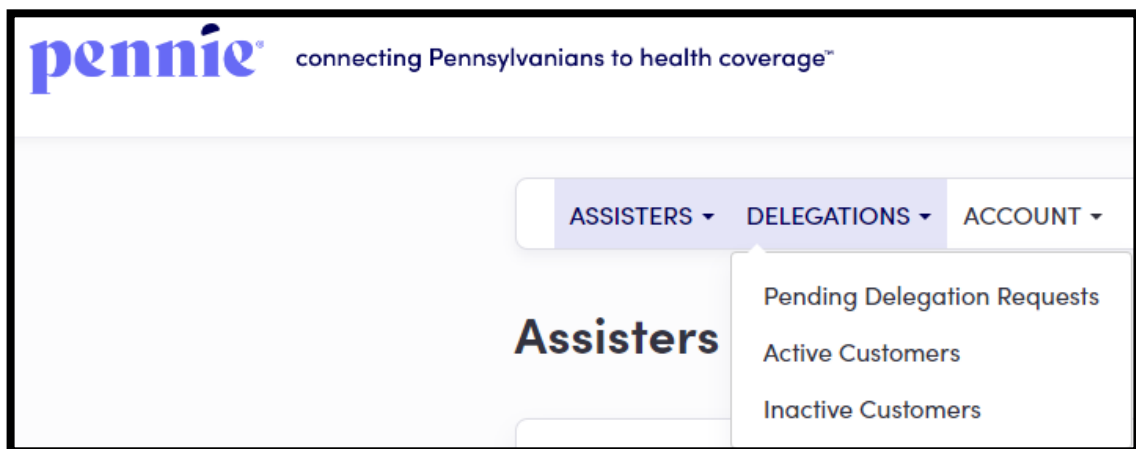
3. Certified Assisters

3.1 Manage Assisters

For detailed information on how to Manage Assisters please refer to Section 2.



4. Delegations

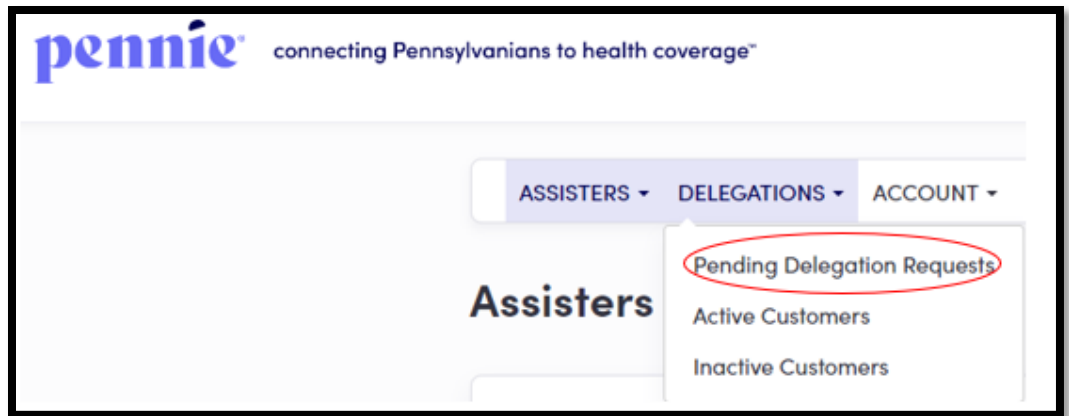


4.1 Pending Delegation Requests (New Designation Request)

The Pending Delegation Requests section displays a list of pending customer designation requests for an Assister associated with the Entity organization. The Entity has an option to accept or decline an individual's designation request on behalf of the Assister. If the request is accepted, then the individual will move to the Active Customers section. If the request is declined the customer will automatically move to the Inactive Customers section. The Entity can view and search for the list of pending customer designation requests filtered by customer name, Assister name, and request received date range.

4.1.1 View and search for pending delegation requests

- Step-1: Click on the 'Delegations' tab and select 'Pending Delegation Requests'.



- Step-2: Enter customer's name in the 'Customer Name' field or Assister name in the 'Assister Name' field or enter the desired date range during which an individual

delegation request was received in the 'Received On' section under the "Refine Results By" section and click on the 'Go' button.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Pending Request 1 Pending Request

Refine Results By (reset all)

Customer Name
Assister's Name
Received On
From: mm/dd/yyyy
To: mm/dd/yyyy
Go

Customer Name ▾	Received On ▾	Assister's Name ▾
Cara Danvers	11/07/2021	Olivia Fox

4.1.2 Accept or decline individual delegation request


- Step-1: Click on the 'Delegations' tab and select 'Pending Delegation Requests'.

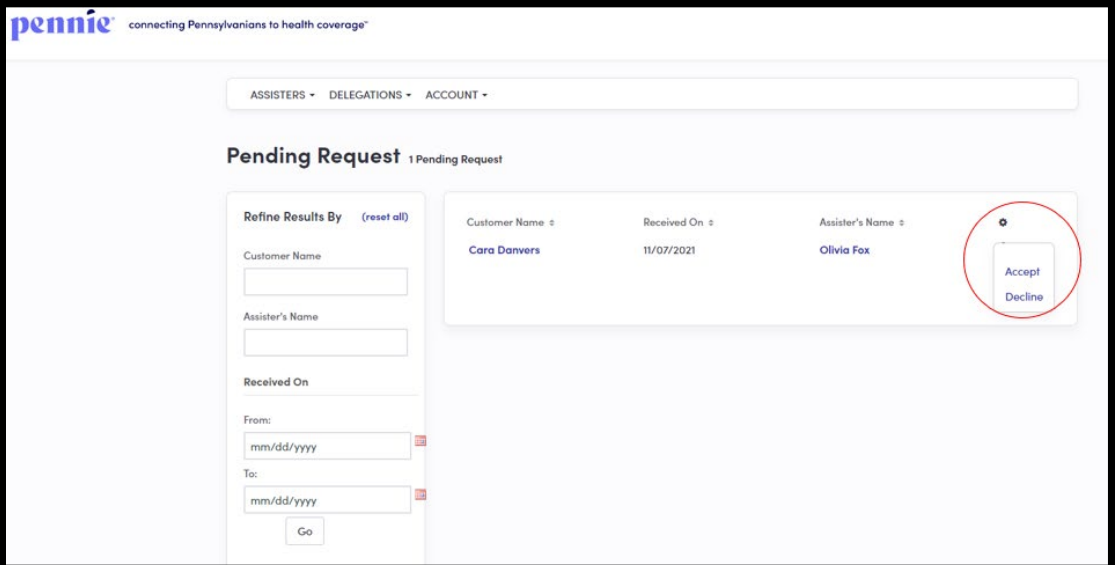
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ASSISTERS ▾ **DELEGATIONS ▾** ACCOUNT ▾

Assisters

- Pending Delegation Requests**
- Active Customers
- Inactive Customers

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



Pending Request 1 Pending Request

Refine Results By (reset all)

Customer Name

Assister's Name

Received On

From: mm/dd/yyyy

To: mm/dd/yyyy

Go

Customer Name	Received On	Assister's Name
Cara Danvers	11/07/2021	Olivia Fox

Accept
Decline

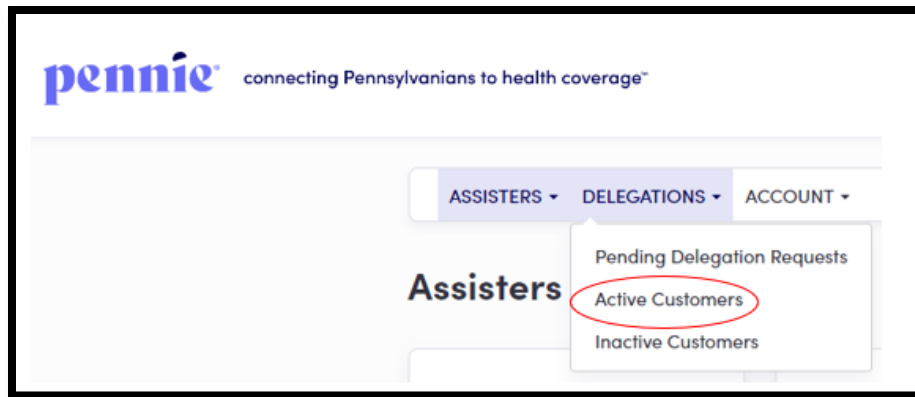
4.2 Active Customers (Existing Designations)

The Active Customers section displays a complete list of customer designations accepted by the Assisters. The Active Customers list displays their name, date since their designation is active, designated Assister name, eligibility status, application status, and an action button that assists an Entity in performing actions on an individual account on behalf of the designated CEC.

The Active Customers section helps an Entity to view and search for active individuals list, transfer customer delegation from one Assister to another within the Entity Organization, view individual summary, provide comments on an individual's profile, and mark an individual as inactive.

4.2.1 View and search for active designations

- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



- Step-2: Search by entering the customer's name in the 'Customer Name' field; Assister name in the 'Assister Name' field; select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list; select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list; or enter the desired date range since the customer

designation is active in the 'Active Since' section under the "Refine Results By" section. Then click on the 'Go' button.

Active Delegations 12 Active Delegations(x)

Export Book of Business (All Assistants)
Export Book of Business for an Assister
Change Delegation (0 Items Selected)

Refine Results By (reset all)

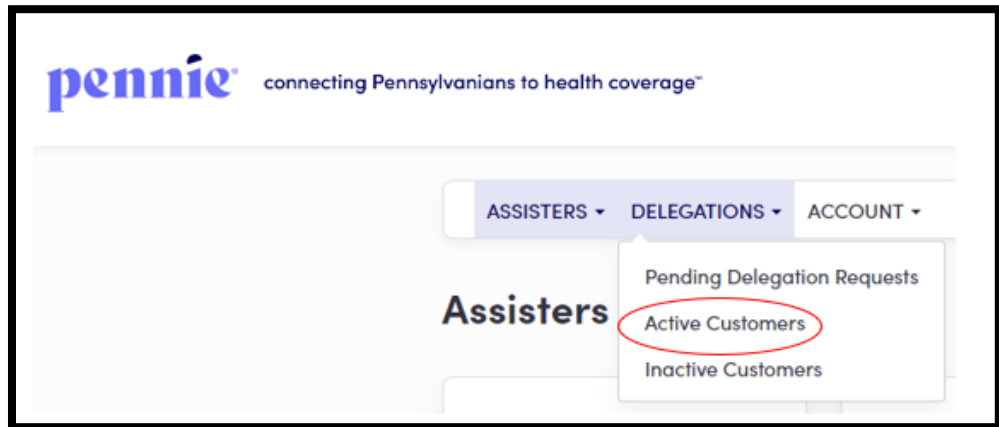
Customer Name
Assister's Name
Eligibility Status
Application Status
Active Since
From: mm/dd/yyyy
To: mm/dd/yyyy
Go

<input type="checkbox"/>	Customer Name	Active Since	Assister's Name	ELIGIBILITY STATUS	Application Status
<input type="checkbox"/>	Dan Thomas	07/06/2022	Olivia Fox	Conditional	Eligibility Received
<input type="checkbox"/>	Denise Blackman	07/06/2022	Sam Garvey	Pending	Open
<input type="checkbox"/>	Danny Blackman	07/06/2022	Sam Garvey	Pending	Open
<input type="checkbox"/>	Fred Fox	07/06/2022	Sam Garvey	Pending	Open
<input type="checkbox"/>	Jane Doe	07/06/2022	Sam Garvey		
<input type="checkbox"/>	Kim Lee	07/06/2022	Sam Garvey	Pending	Open
<input type="checkbox"/>	Linda Davis	12/20/2021	Olivia Fox	Pending	Open
<input type="checkbox"/>	Linda Ortega	12/20/2021	Olivia Fox		
<input type="checkbox"/>	Lita Rivera	12/20/2021	Olivia Fox	Pending	Open
<input type="checkbox"/>	Lita Ortega	12/20/2021	Olivia Fox	Pending	Open

4.2.2 Change customer delegation from one Assister to another Assister

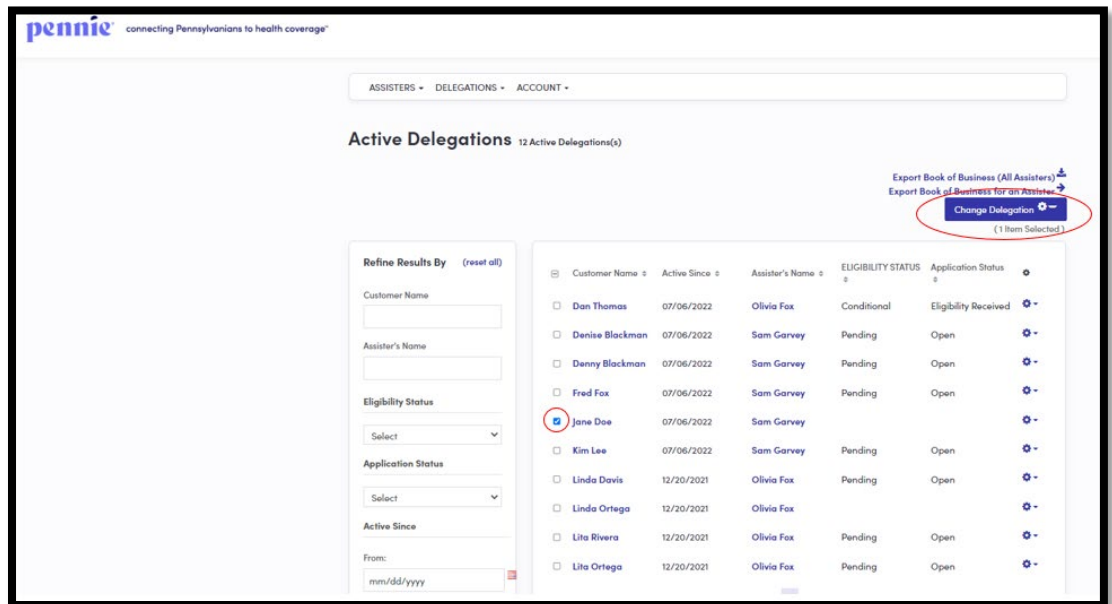
This section helps the Entity in changing a customer delegation from one Certified Assister to another within the Entity Organization. This step is performed when an Assister is no longer associated with the Entity organization.

- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



- Step-2: Select checkbox next to a customer's name, click on the 'Change Delegation' button and select the 'Change Delegation'.

PLEASE NOTE: The 'Change Delegation' button is only activated when the Entity selects the checkbox next to the customer's name.



- Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

PLEASE NOTE: Only the Assistors with “Active” activity status will appear in the Assister search list.

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ASSISTERS • DELEGATIONS • ACCOUNT

Transfer Consumer Delegations

Please select a Assister below and click the "Re-assign" button to move the Consumer Case(s) you selected on the previous screen to the target .

Search For Assister

Assister First Name: Olivia
Assister Last Name: Fox
Site: Fred's Stars
Assister Email:
Assister Certification No.:

Pick Assister **Search** **Re-assign**

Assister Name	Status	Email	Primary Site
Olivia Fox	Active		

- If the Entity wants to see all the active Assisters present in the Entity organization, just click on the 'Search' button.

The screenshot shows the 'Transfer Consumer Delegations' page. At the top, there's a navigation bar with 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT'. Below this, a message says 'Please select a Assister below and click the "Re-assign" button to move the Consumer Case(s) you selected on the previous screen to the target.' The search form includes fields for 'Assister First Name', 'Assister Last Name', 'Site' (a dropdown menu), and 'Assister Certification No.'. A blue 'Search' button is circled in red. Below the form is a table with columns: 'Pick Assister', 'Assister Name', 'Status', 'Email', 'Primary Site', and 'Re-assign'. A message at the bottom says 'To see a list of Assisters, please enter information in the search box(es) above.'

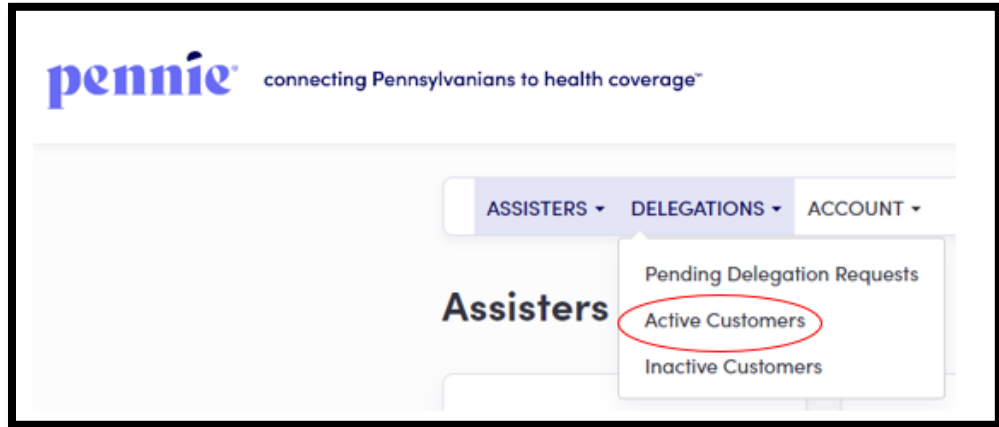
- Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.

This screenshot shows the same page as the previous one, but with the search results table populated. The 'Pick Assister' column contains two radio buttons, the first of which is circled in red. The table lists two active assisters: Olivia Fox and Sam Garvey. The 'Re-assign' button is visible at the bottom right of the table.

Pick Assister	Assister Name	Status	Email	Primary Site	Re-assign
<input type="radio"/>	Olivia Fox	Active			
<input type="radio"/>	Sam Garvey	Active			

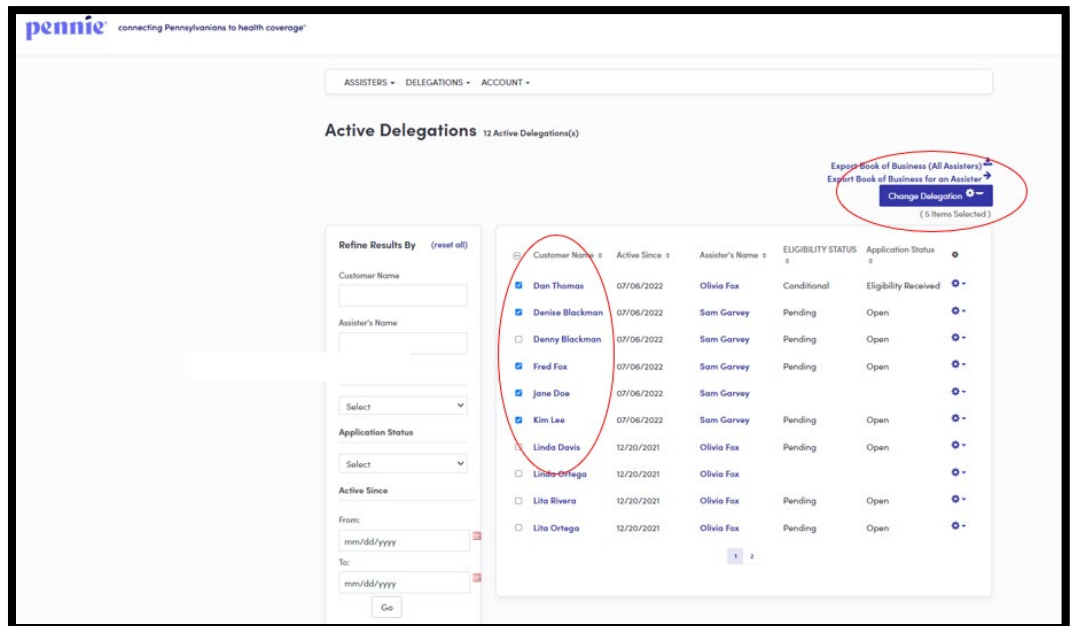
4.2.3 Change multiple customer delegations from one Assister to another Assister

- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



- Step-2: Select the main checkbox next to the 'Customer Name' title, click on the 'Change Delegation' button and select 'Change Delegation'.

PLEASE NOTE: The 'Change Delegation' button is only activated when the Entity selects the checkbox next to the 'Customer Name' title.



- Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

PLEASE NOTE: Only the Assistors with "Active" activity status will appear in the Assister search list.

The screenshot shows the 'Transfer Consumer Delegations' page on the Pennie website. The page has a header with the Pennie logo and navigation links. Below the header, there are tabs for 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT'. The main heading is 'Transfer Consumer Delegations'. A blue box contains the instruction: 'Please select a Assister below and click the "Re-assign" button to move the Consumer Case(s) you selected on the previous screen to the target .'. Below this, there is a 'Search For Assister' section with input fields for 'Assister First Name' (containing 'Olivia'), 'Assister Last Name' (containing 'Fox'), and 'Site' (a dropdown menu showing 'Fred's Stars'). There are also empty fields for 'Assister Email' and 'Assister Certification No.'. A 'Search' button is circled in red. Below the search fields, there is a table with columns: 'Pick Assister', 'Assister Name', 'Status', 'Email', and 'Primary Site'. The table contains one row with a radio button in the 'Pick Assister' column, 'Olivia Fox' in the 'Assister Name' column, and 'Active' in the 'Status' column. A 'Re-assign' button is also visible.

- If the Entity wants to see all the active Assistors present in the Entity organization, just click on the 'Search' button.

The screenshot shows the 'Transfer Consumer Delegations' page on the Pennie website. The page has a header with the Pennie logo and navigation links. Below the header, there are tabs for 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT'. The main heading is 'Transfer Consumer Delegations'. A blue box contains the instruction: 'Please select a Assister below and click the "Re-assign" button to move the Consumer Case(s) you selected on the previous screen to the target .'. Below this, there is a 'Search For Assister' section with input fields for 'Assister First Name', 'Assister Last Name', and 'Site' (a dropdown menu showing 'Select One'). There are also empty fields for 'Assister Email' and 'Assister Certification No.'. A 'Search' button is circled in red. Below the search fields, there is a table with columns: 'Pick Assister', 'Assister Name', 'Status', 'Email', and 'Primary Site'. Below the table, there is a blue box with the text: 'To see a list of Assistors, please enter information in the search box(es) above.'

- Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.

Transfer Consumer Delegations

Please select a Assister below and click the "Re-assign" button to move the Consumer Case(s) you selected on the previous screen to the target .

Search For Assister

Assister First Name: Assister Last Name: Site:

Assister Email: Assister Certification No.:

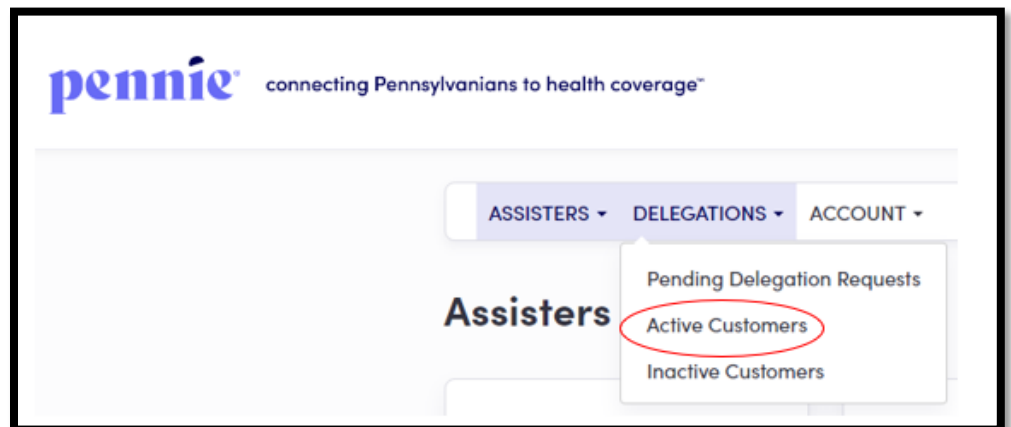
Pick Assister	Assister Name	Status	Email	Primary Site
<input type="radio"/>	Olivia Fox	Active		
<input type="radio"/>	Sam Garvey	Active		

4.2.4 Perform actions on customer profile

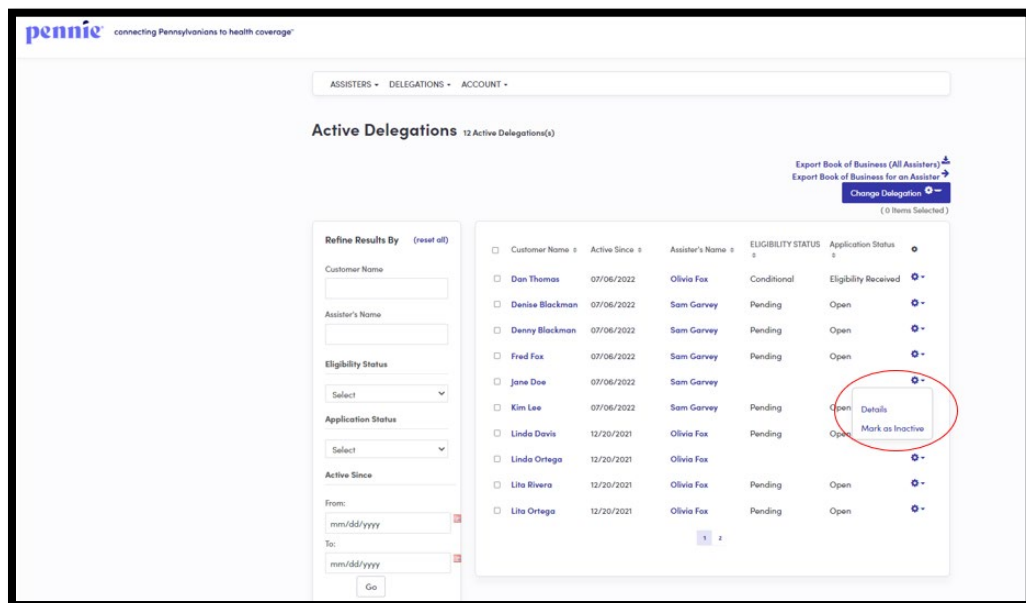
The Entities can perform actions on customer accounts which includes view customer summary, provide comments on a customer's profile, resend activation email to a customer and mark an individual as inactive.

4.2.4.1 View individual summary

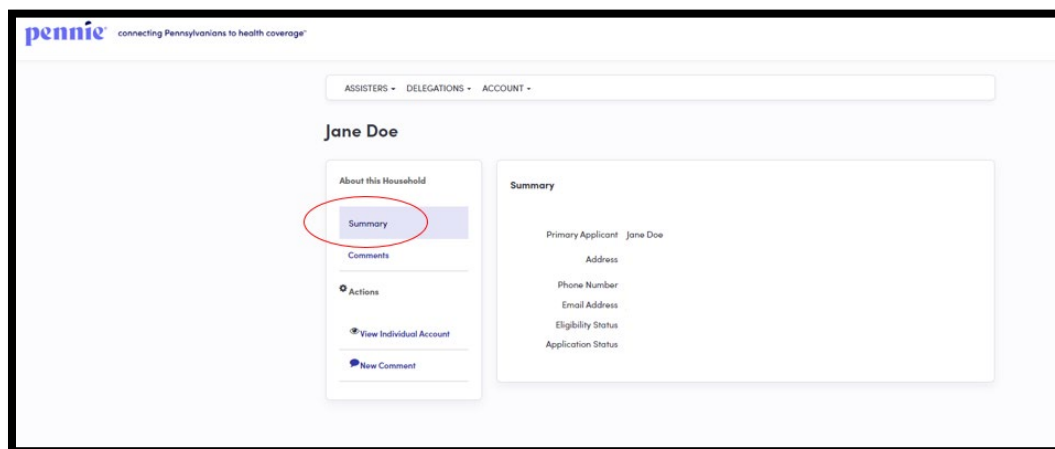
- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



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

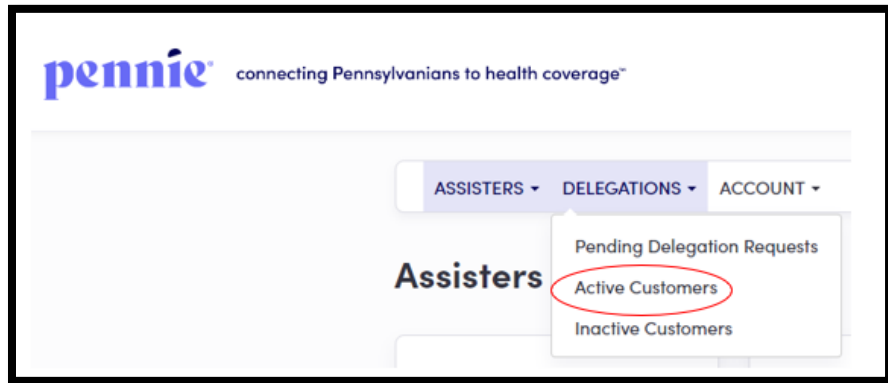



- Step-3: Go to “Summary” section and the following screen will display an individual summary.

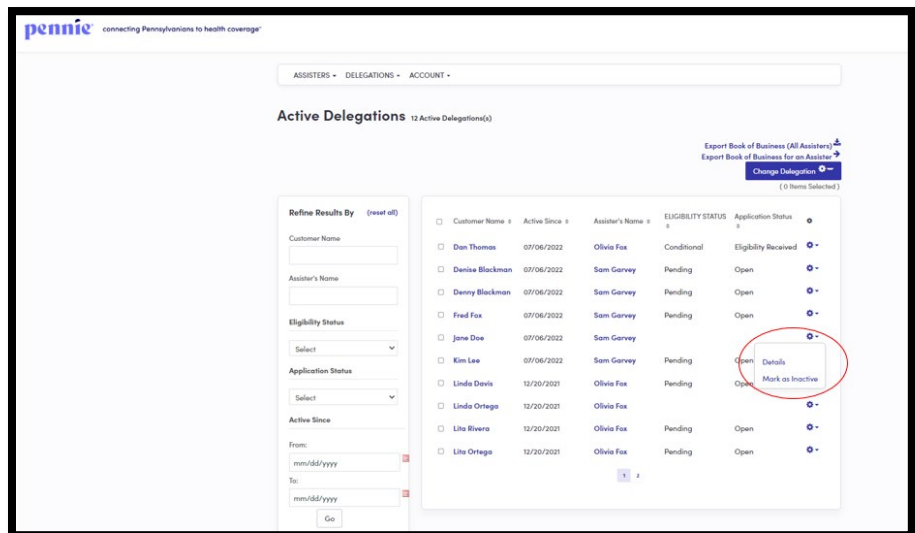


4.2.4.2 Provide comments on individual profile

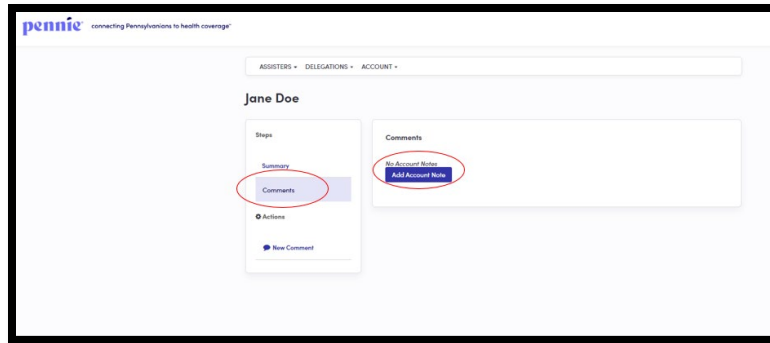
- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



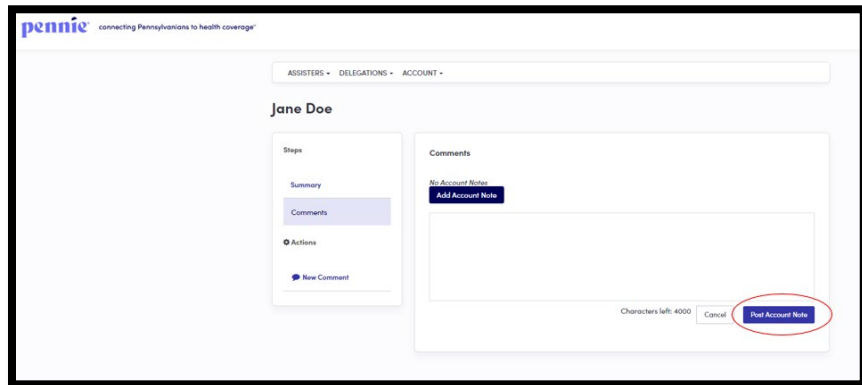
- Step-2: Click on the  button and click on 'Details'.



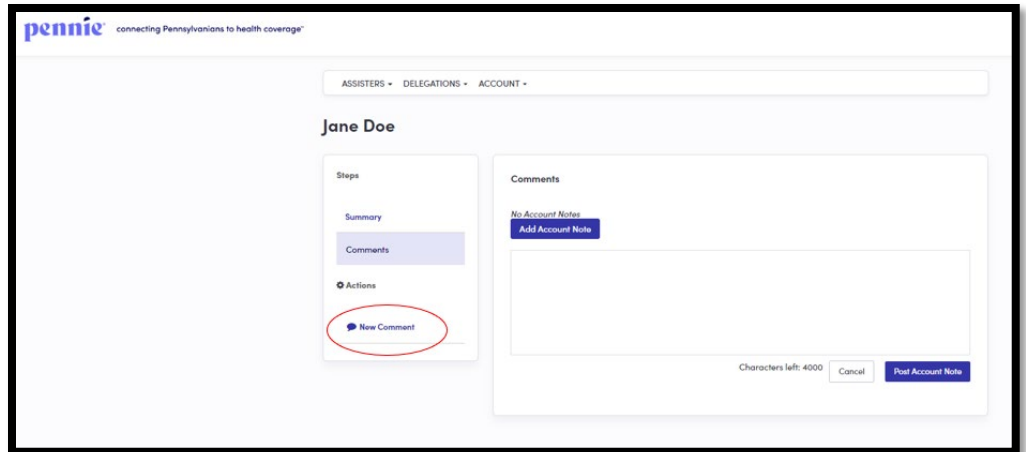
- Step-3: Go to "Comments" section and click on the 'Add Comments' button.



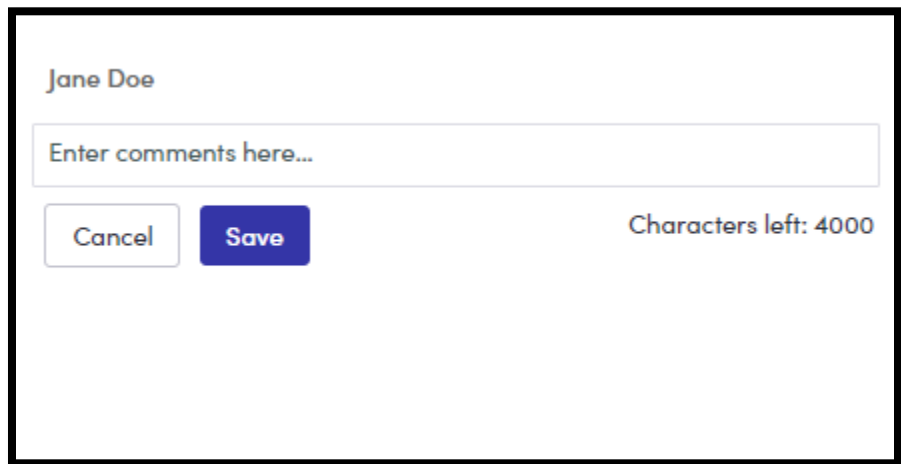
- Step-4: Provide comments in the text area and click on the 'Post Comment' button.



- Step-4 (Another way): Perform Step-1 and Step-2 from Section 4.2.4.2 and click on 'New Comment' under the "Actions" section.

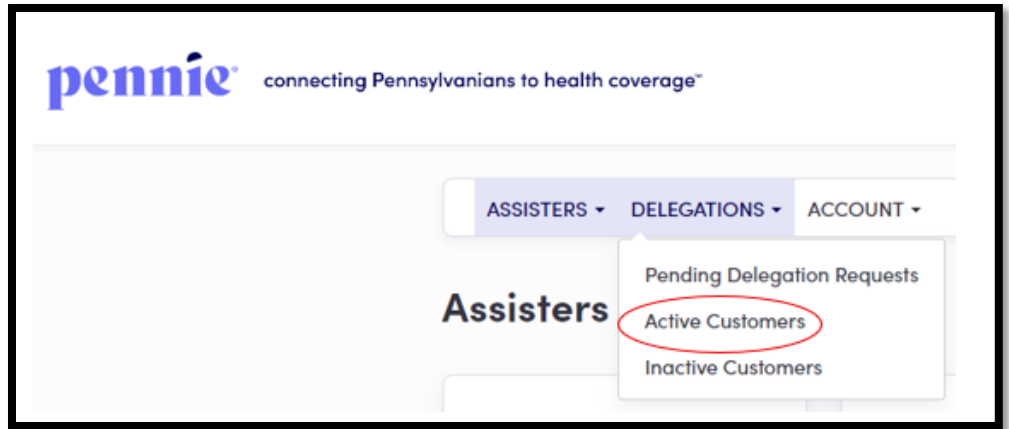



- Step-4 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.

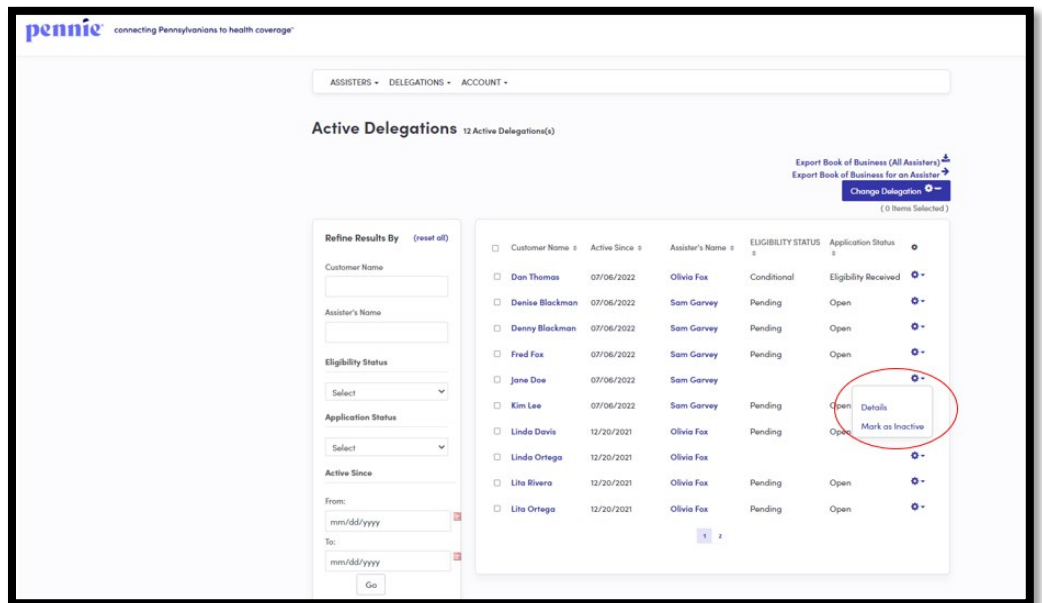


4.2.4.3 Update comments on individual profile

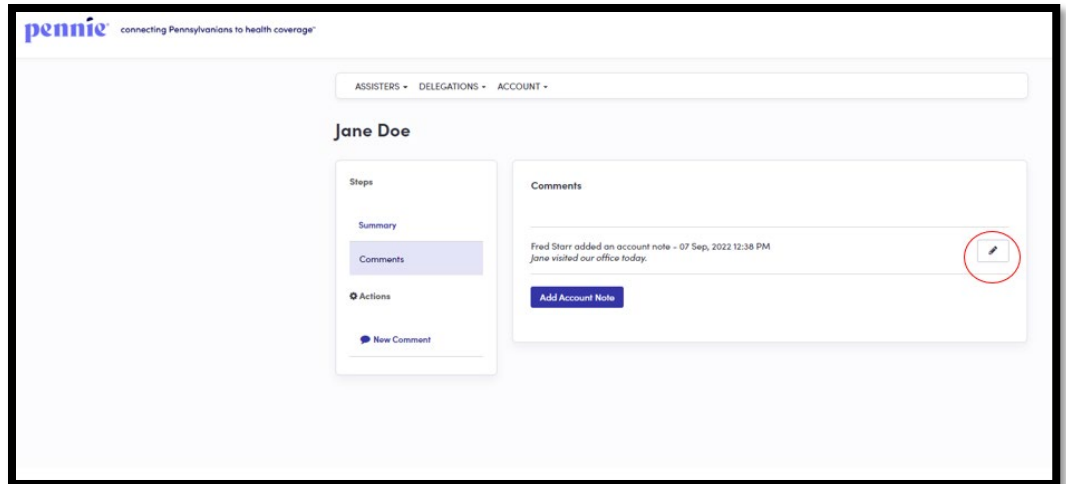
- Step-1: Click on the 'Delegations' tab and select 'Active Customers'.



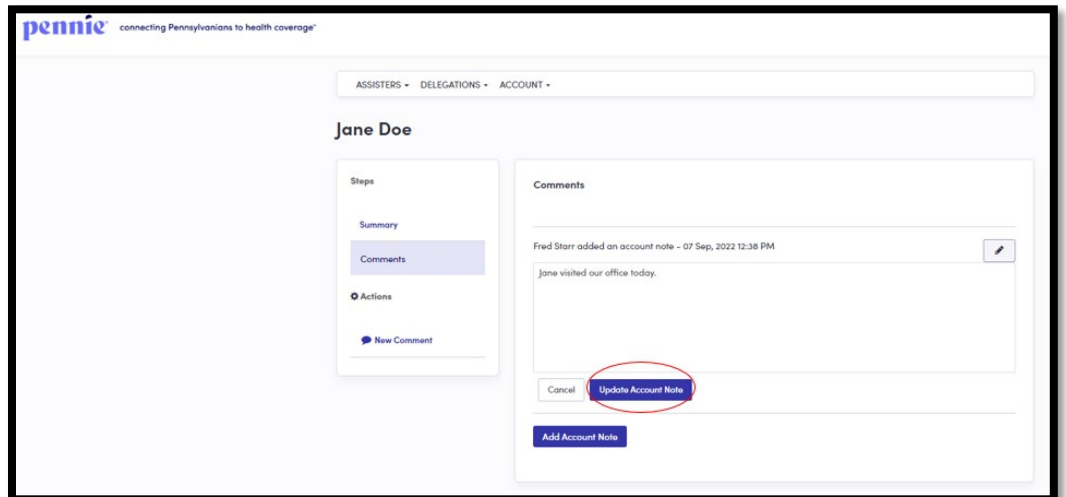
- Step-2: Click on the  button and click on 'Details'.



- Step-3: Go to "Comments" section and click on the  button.



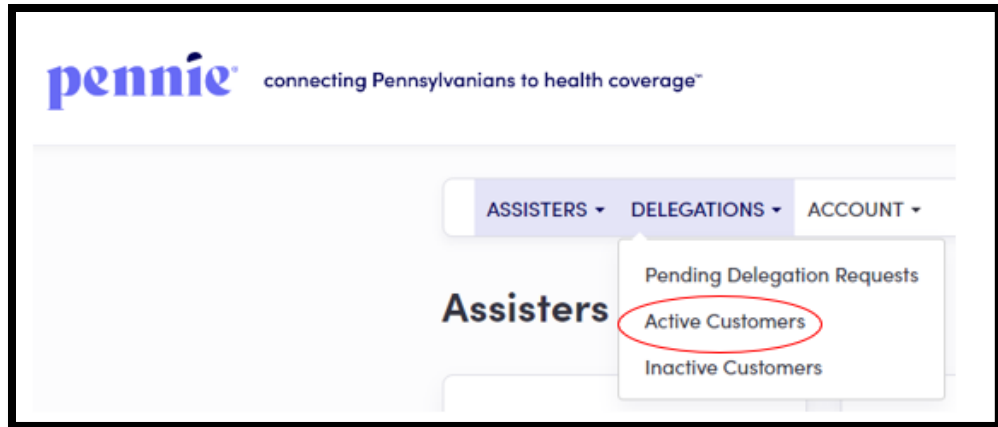
- Step-4: Enter the updated comment in the text area and click on the 'Update Comment' button.



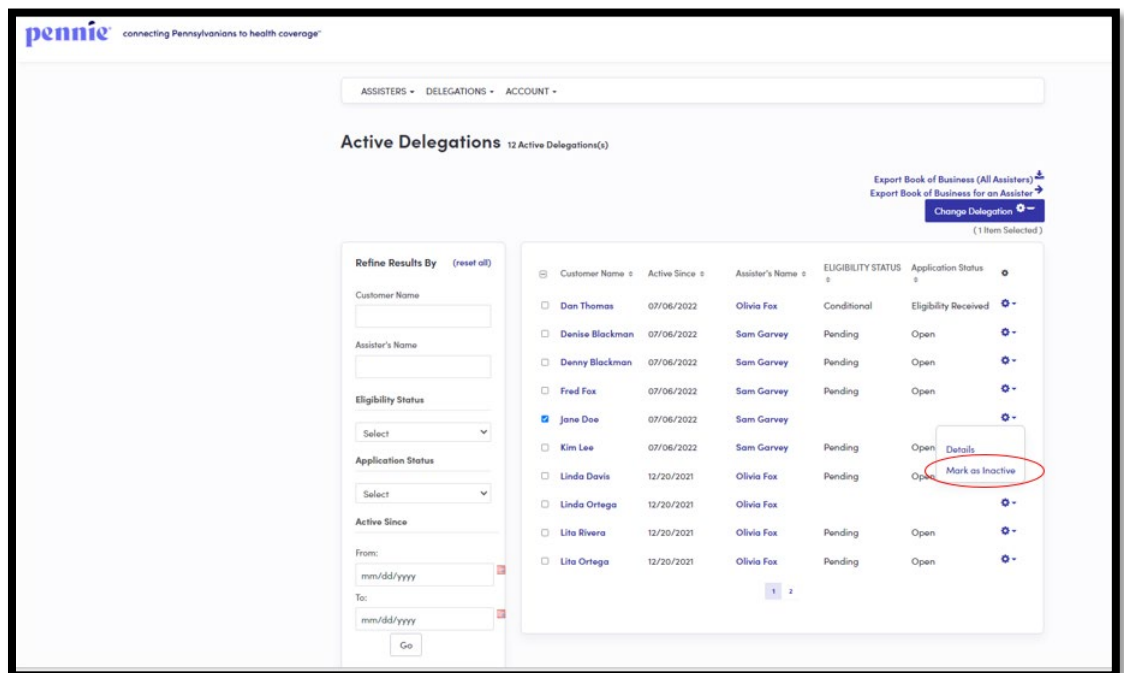
4.2.5 Mark an individual as inactive

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 Customer” section.

- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

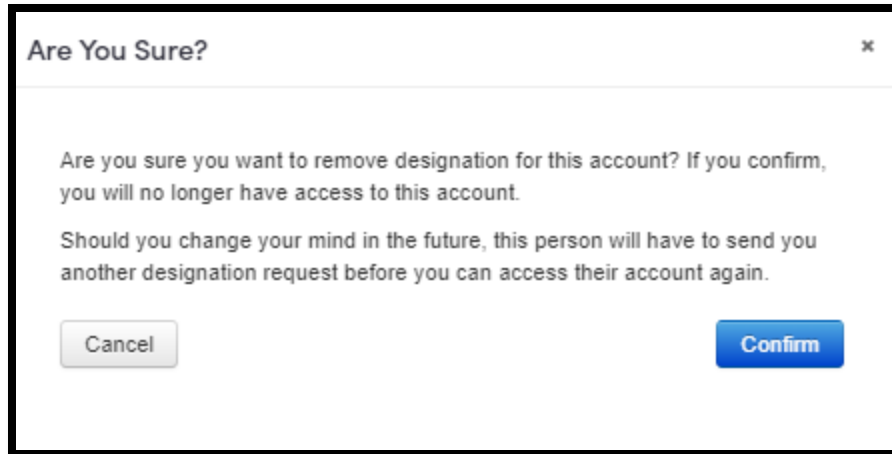


- Step-2: Click on the  button and click on 'Mark as Inactive'.



- Step-3: A pop-up screen will appear. Click on 'Confirm' to inactivate current individual account and 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 delegation request before you can perform actions on their behalf.

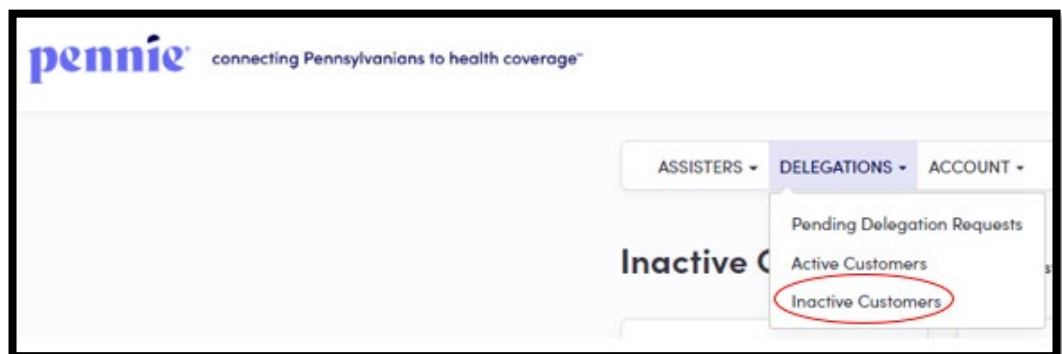


4.3 Inactive Customers (Undesignated Customers)

The Inactive Customers section displays the list of individuals whose delegation requests were declined, were marked as inactive by their Entity organization or Assister, or the individual de-designated the Assister. The Entity can view and search the list of inactive individuals, filtered by Customer Name, Assister Name, or an Inactive date range.

4.3.1 View and search for inactive customers

- Step-1: Click on the 'Delegations' tab and select 'Inactive Customer'.



- Step-2: Enter individual's first name in the 'Customer Name' field; Assister name in the 'Assister Name' field; or enter the desired date range since an individual

designation has been inactive in the 'Inactive Since' section under the "Refine Results By" section. Then click on the 'Go' button.

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Inactive Customers 2 Inactive Customer

Refine Results By (reset all)

Customer Name
Assister's Name
Inactive Since
From: mm/dd/yyyy
To: mm/dd/yyyy
Go

Customer Name	In-Active since	Assister's Name
Dan Smart	09/25/2020	Sam Garvey
Kate Upland	11/07/2021	Olivia Fox

5. Account

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ASSISTERS • DELEGATIONS • **ACCOUNT** •

Assisters 4 Matching Assister

Refine Results By (reset all)

Assisters' First Name

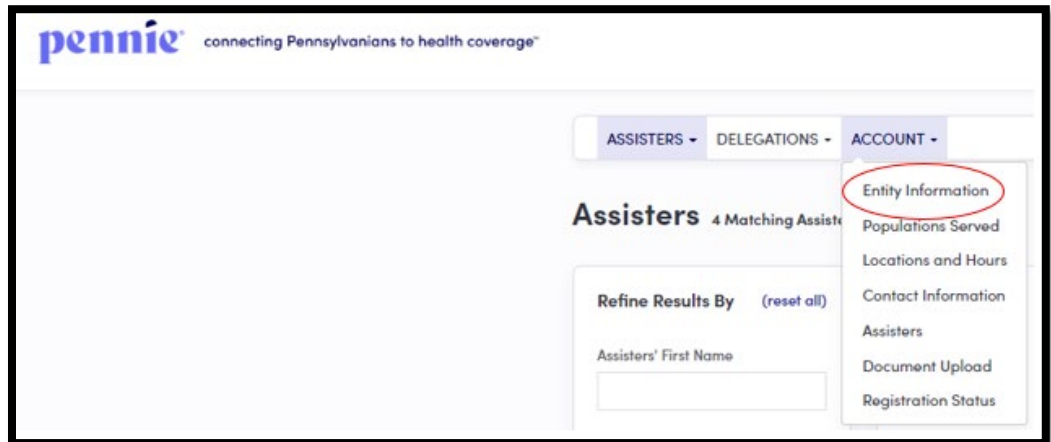
- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Assisters
- Document Upload
- Registration Status

The Account section provides the Entity organization information that was entered while creating an Entity account. This section allows the Entity to update the Entity information, populations served, location and hours, contact information, add and update Certified Assister, and view current Entity organization registration status.

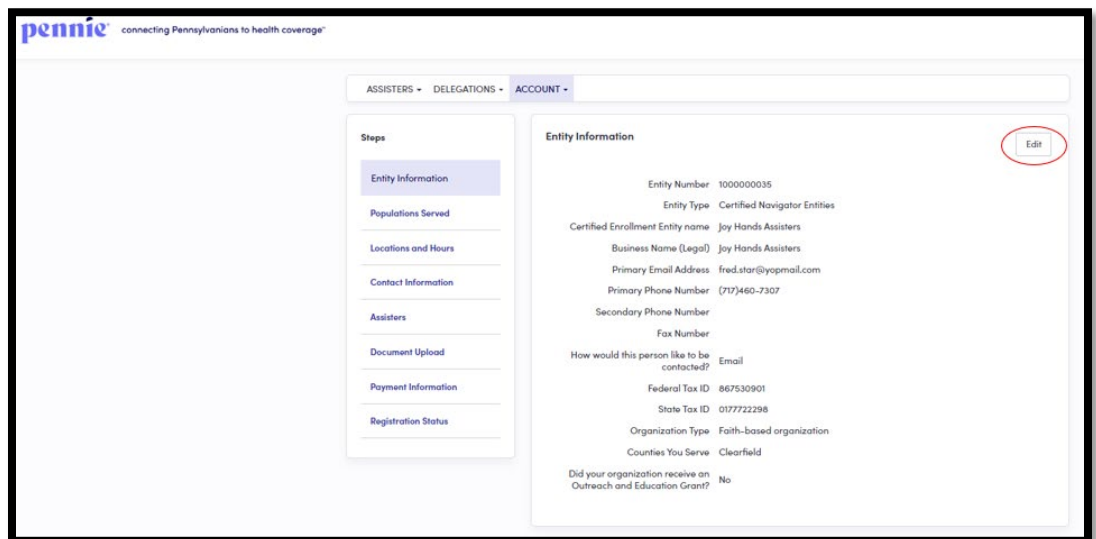
5.1 Entity Information

5.1.1 Edit entity information

- Step-1: Click on the 'Account' tab and select 'Entity Information'.



- Step-2: Go to "Entity Information" section and click on the 'Edit' button.



- Step-3: Edit Entity information (e.g., "Entity Name" or "Primary Phone Number" or "State Tax ID" number) and click on the 'Save' button.

PLEASE NOTE: Many of the options on this screen, including information related to grant funding, relate to functions that Pennie has chosen not to enable on the Pennie Platform. For the options here we have provided suggested values, such as

Entity Type is “In-person Assistance”, Organization Type is “Private Partnership”, and Did your organization receive an Outreach and Education Grant? is “No”.

The screenshot displays the Pennie web application interface. At the top, the logo "pennie" is followed by the tagline "connecting Pennsylvanians to health coverage". Below this, a navigation bar contains "ASSISTERS", "DELEGATIONS", and "ACCOUNT". A sidebar on the left lists the steps: "Entity Information", "Populations Served", "Locations and Hours", "Contact Information", "Assisters", "Document Upload", "Payment Information", and "Registration Status". The main content area is titled "Step 1: Entity Information" and contains the following fields:

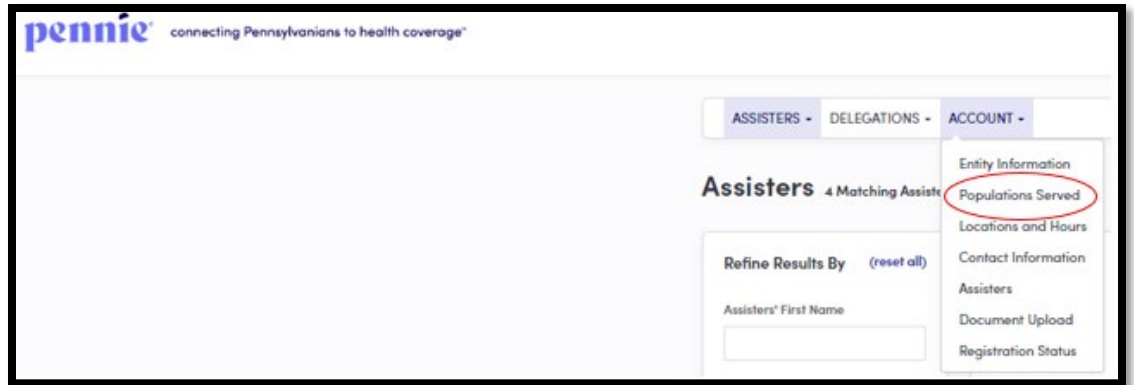
- Entity Type:** Radio buttons for "In-Person Assistance", "Certified Navigator Entities" (selected), and "Certified Application Counselor".
- Entity Name:** Text input field containing "Joy Hands Assistors".
- Business Name (Legal):** Text input field containing "Joy Hands Assistors".
- Primary Email Address:** Text input field containing "fred.star@jyapmail.com".
- Primary Phone Number:** Text input field with three segments: "717", "460", and "7307".
- Secondary Phone Number:** Text input field with three segments: "XXX", "XXX", and "XXXX".
- How would you like for us to contact you?:** Radio buttons for "Email" (selected), "Phone", "Fax", and "Mail".
- Fax:** Text input field with three segments: "XXX", "XXX", and "XXXX".
- Federal Tax ID:** Text input field containing "867530901".
- State Tax ID:** Text input field containing "0177722296".
- Organization Type:** Dropdown menu showing "Faith-based organization".
- Counties Served:** Text input field containing "Clearfield, PA".
- Did your organization receive an Outreach and Education Grant?:** Radio buttons for "Yes" and "No" (selected).

At the bottom right of the form, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a red circle.

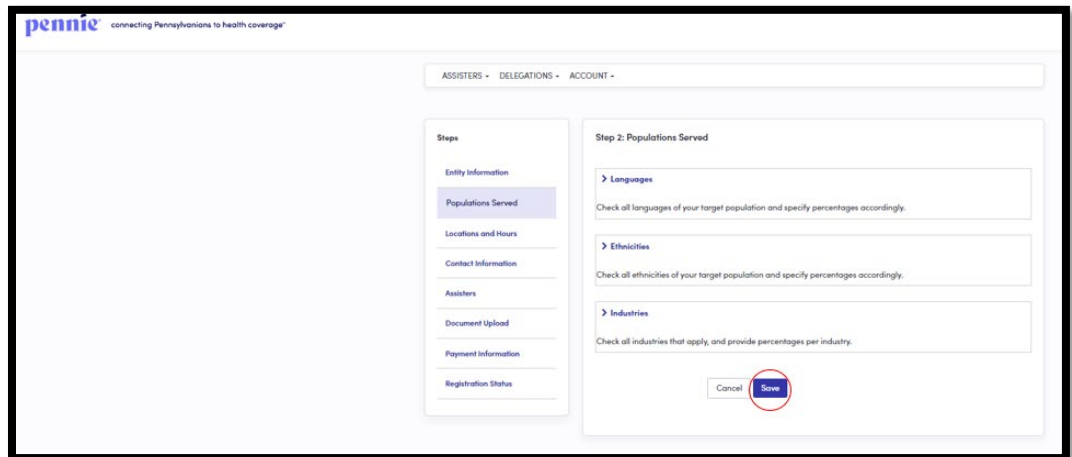
5.2 Populations Served

5.2.1 Edit populations served information

- Step-1: Click on the 'Account' tab and select 'Populations Served'.



- Step-2: Click on the 'Edit' button.



- Step-3: Update the Languages (e.g., "English" or "Spanish"), targeted Ethnicities (e.g., "African" or "Chinese"), and Industries (e.g., "Health Care" or "Agriculture") information of the populations you intend to serve, and an estimated percentage of assistance provided in each section. Click on the 'Save' button.

If your Entity organization does not target specific Ethnicities or Industries you can choose "Other," type in a value of "All," and mark "100" in the "Estimated Percent" columns.

PLEASE NOTE: The total "Estimated Percent" value in each section must add up to 100%.

5.3 Location and Hours

5.3.1 Edit Primary Site information

- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

- Step-2: Click on the Entity organization's primary site name.

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ASSISTERS • DELEGATIONS • ACCOUNT

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Assisters
- Document Upload
- Payment Information
- Registration Status

Site Name Address

Add Sub-Site

> 90 Beaver Drive

> Fred's Stars

- Step-3: Click on the 'Edit' button.

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ASSISTERS • DELEGATIONS • ACCOUNT

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Assisters
- Document Upload
- Payment Information
- Registration Status

Site Name Address

Add Sub-Site

▼ 90 Beaver Drive

Edit

Site Name

Primary Email Address

Primary Phone Number

Secondary Phone Number

Hours of Operation

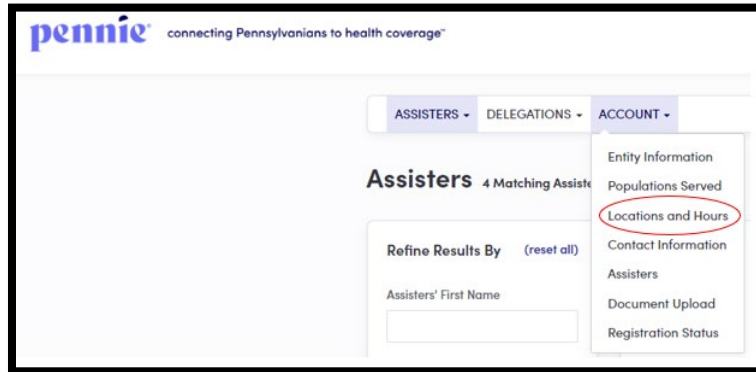
Monday	Closed - Closed
Tuesday	Closed - Closed
Wednesday	Closed - Closed
Thursday	Closed - Closed
Friday	08:00 am - 05:30 pm
Saturday	08:00 am - 12:00 pm
Sunday	08:00 am - 12:00 pm

- Step-4: Update primary site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the 'Save' button.

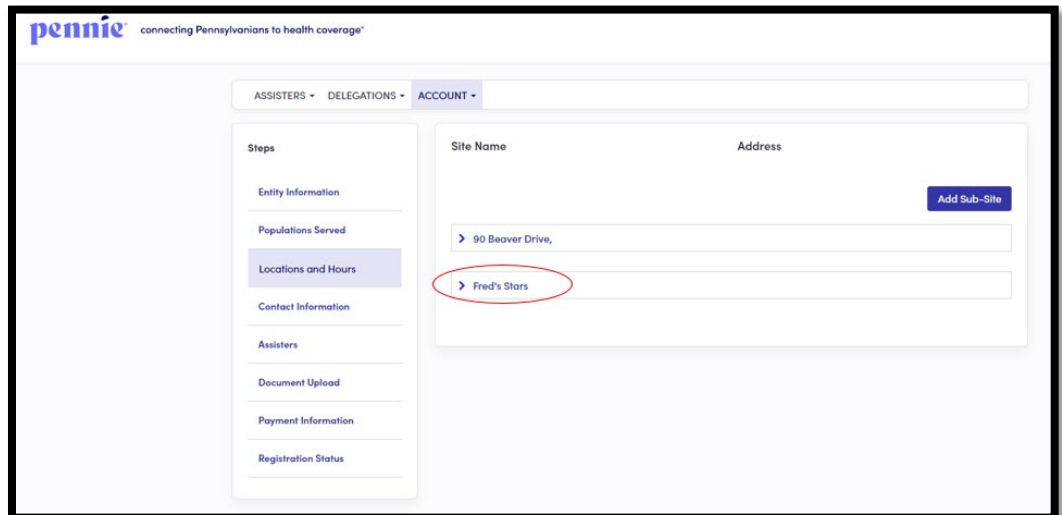
PLEASE NOTE: If you do not enter the physical address then the “Find Local Assistance” directory tool will not be able to provide geographic search results (i.e. by zip code and distance) for your location.

5.3.2 Edit Sub-Site information

- Step-1: Click on the ‘Account’ tab and select ‘Locations and Hours’.



- Step-2: Click on the Entity Organization’s sub-site name.



- Step-3: Click on the ‘Edit’ button.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Steps

- Entity Information
- Populations Served
- Locations and Hours**
- Contact Information
- Assisters
- Document Upload
- Payment Information
- Registration Status

Site Name **Address**

Add Sub-Site

▼ 90 Beaver Drive

Edit

Site Name
Primary Email Address
Primary Phone Number
Secondary Phone Number

Hours of Operation

Monday	Closed - Closed
Tuesday	Closed - Closed
Wednesday	Closed - Closed
Thursday	Closed - Closed
Friday	08:00 am - 05:30 pm
Saturday	08:00 am - 12:00 pm
Sunday	08:00 am - 12:00 pm

- Step-4: Update sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the 'Save Sub-Site' button.

5.3.3 Add sub-site information

- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Assisters 4 Matching Assisters

Refine Results By (reset all)

Assisters' First Name

- Entity Information
- Populations Served
- Locations and Hours**
- Contact Information
- Assisters
- Document Upload
- Registration Status

- Step-2: Click on the 'Add Sub-Site' button.

The screenshot shows the pennie website interface. At the top, there's a navigation bar with 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT' tabs. The 'ACCOUNT' tab is selected. On the left, there's a sidebar with a 'Steps' section containing links for 'Entity Information', 'Populations Served', 'Locations and Hours', 'Contact Information', 'Assisters', 'Document Upload', 'Payment Information', and 'Registration Status'. The 'Locations and Hours' link is highlighted. The main content area has a form with 'Site Name' and 'Address' fields. The 'Address' field contains '90 Beaver Drive,' and 'Fred's Stars'. A blue 'Add Sub-Site' button is circled in red in the top right corner of the form.

- Step-3: Enter sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the 'Save Site' button.

5.4 Contact Information

5.4.1 Add or update primary contact and financial contact information

- Step-1: Click on the 'Account' tab and select 'Contact Information'.

The screenshot shows the pennie website interface. At the top, there's a navigation bar with 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT' tabs. The 'ACCOUNT' tab is selected. Below the tabs, there's a section titled 'Assisters' with '4 Matching Assisters'. There's a 'Refine Results By' section with a '(reset all)' link. A dropdown menu is open, showing options: 'Entity Information', 'Populat', 'Locations and Hours', 'Contact Information' (circled in red), 'Assisters', 'Document Upload', and 'Registration Status'. Below the dropdown, there's a text input field for 'Assisters' First Name'.

- Step-2: Click on the 'Edit' button.

The screenshot shows the pennie web application interface. At the top, the logo "pennie" is followed by the tagline "connecting Pennsylvanians to health coverage". Below this is a navigation bar with tabs for "ASSISTERS", "DELEGATIONS", and "ACCOUNT". The "ACCOUNT" tab is selected. On the left side, there is a "Steps" sidebar with links for "Entity Information", "Populations Served", "Locations and Hours", "Contact Information" (which is highlighted), "Assisters", "Document Upload", "Payment Information", and "Registration Status". The main content area is titled "Primary Contact" and contains fields for "Name" (Fred Star), "Email", "Primary Phone Number", "Secondary Phone Number", and "How would this person like to be contacted?" (email). Below this is a "Financial Contact" section with identical fields. An "Edit" button is circled in red in the top right corner of the Primary Contact section.

- Step-3: Enter Primary Contact information and Financial Contact information and click on the 'Save' button.

PLEASE NOTE: The Primary Contact and Financial Contact can be the same person.

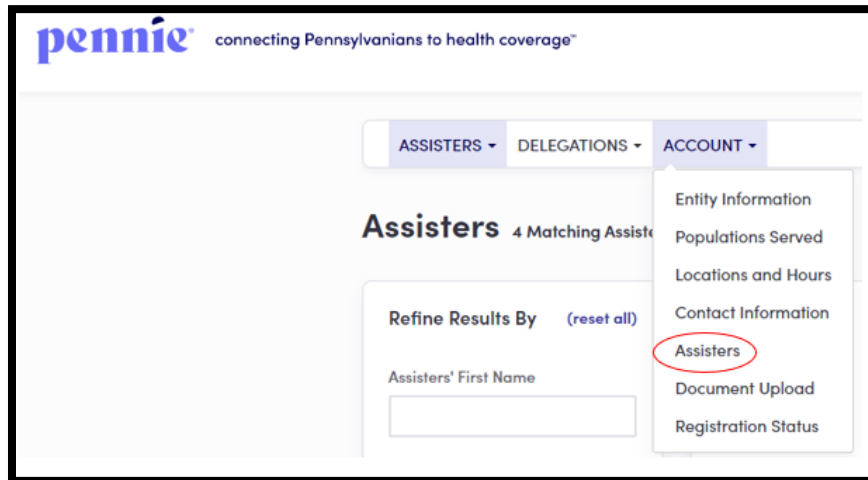
The screenshot shows the pennie web application interface at "Step 4: Contact Information". The "Steps" sidebar on the left is the same as in the previous screenshot, with "Contact Information" highlighted. The main content area is titled "Step 4: Contact Information" and includes the instruction "Tell us about the contact people in your organization:". It contains two sections: "Primary Contact" and "Financial Contact". Each section has fields for "Name", "Email", "Primary Phone Number", "Secondary Phone Number", and "How would this person like to be contacted?". The "Primary Contact" section has "Name" filled with "Fred Star" and "Email" filled with "company@email.com". The "Financial Contact" section has "Name" filled with "Fred Star" and "Email" filled with "company@email.com". The "How would this person like to be contacted?" field has "Email" selected. At the bottom right, there are "Cancel" and "Save" buttons, with the "Save" button circled in red.

5.5 Assistors

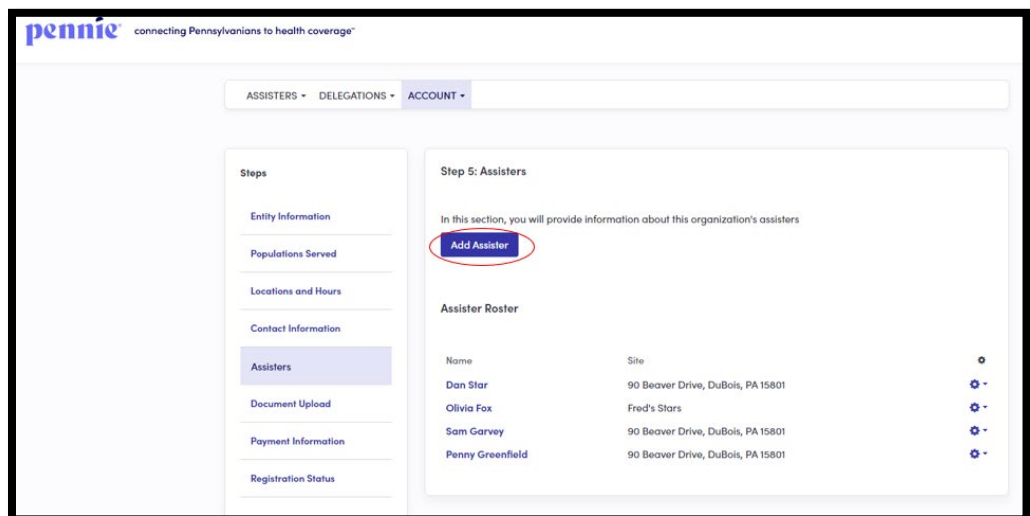
5.5.1 Add an Assister

PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assistors won't receive the invitation email to claim their account until Pennie Assister Administrator (Admin) has updated their Certification Status to "Certified."

- Step-1: Click on the 'Account' tab and select 'Assisters'.



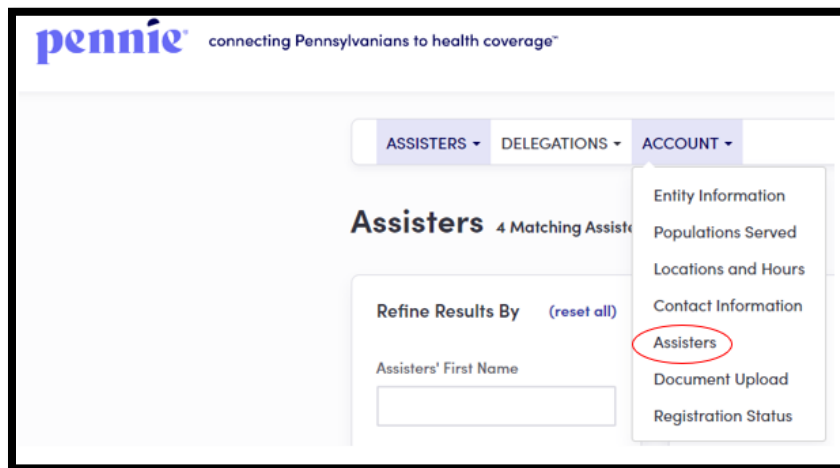
- Step-2: Click on the 'Add Assister' button.



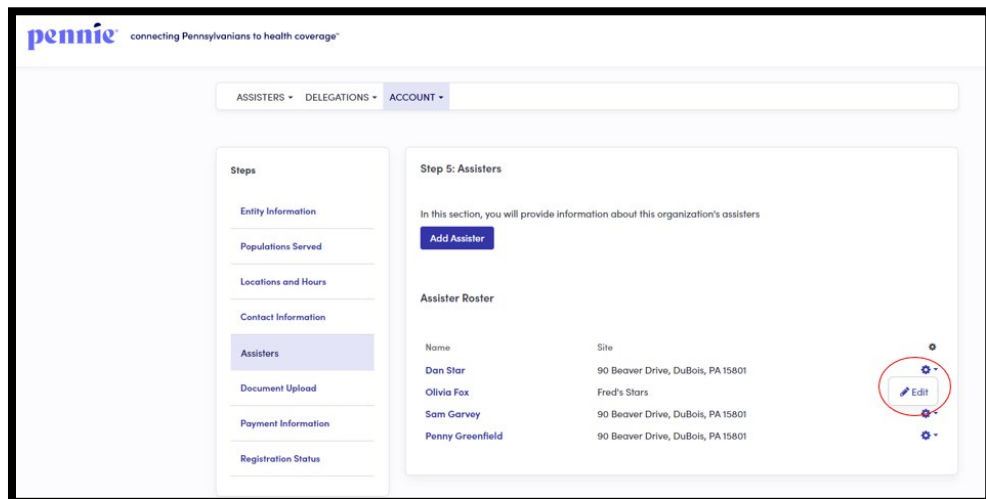
- Step-3: Fill out New Assister Form (for e.g., “First Name” or “Primary Phone Number”), enter the Mailing Address, Profile Information (For e.g., “Spoken Languages Supported” or “Written Languages Supported” or “Education”) and click on the ‘Save’ button.

5.5.2 Add or update an Assister’s information

- Step-1: Click on the ‘Account’ tab and select ‘Assisters’.



- Step-2: Click on the  button and click on ‘Edit’.



- Step-3: Enter Assister information in the New Assister Form (for e.g., “First Name” or “Primary Phone Number”), enter the Mailing Address, Profile Information (For e.g., “Spoken Languages Supported” or “Written Languages Supported” or “Education”) and click on the ‘Save’ button.

5.6 Document Upload

PLEASE NOTE: This section can be ignored; Pennie does not require any documents to be uploaded by Entity organizations.

5.7 Payment Information

PLEASE NOTE: This section can be ignored; Pennie does not use the Pennie Platform to administer grant payments. Please choose a value of “No”.

5.8 Registration Status

The Registration Status section provides a read-only listing to Entity organization’s registration status and registration history.

There are two possible Registration Statuses for the Entity organizations, which are described below:

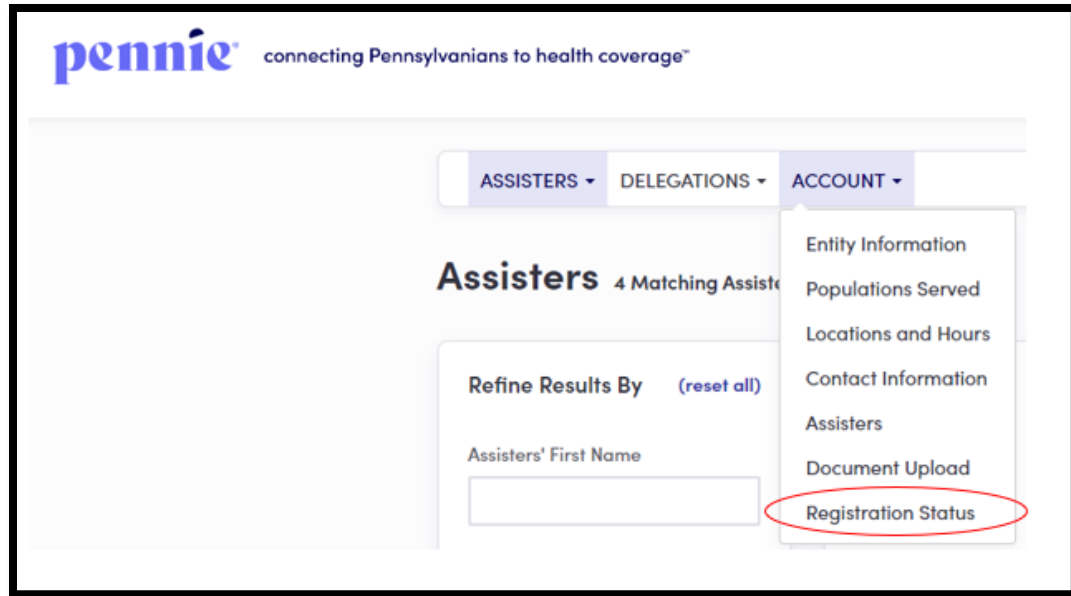
Pending

The Pending registration status is the default status assigned to a new Entity organization whose account has been created on the Pennie Platform and the Entity administrator (Admin) is reviewing their information.

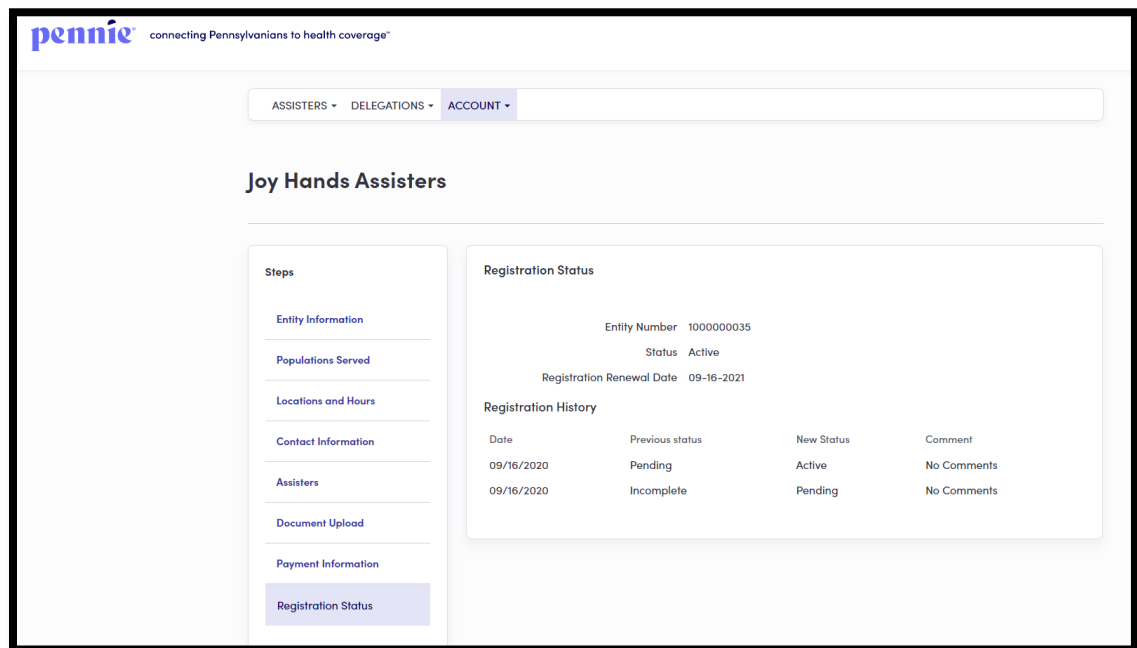
Active

The Active registration status is assigned once the Entity administrator has reviewed and verified the Entity organization information. The Entity account must be in “Active” status in order for the organization’s individual Assistants to be eligible for inclusion in the “Find Local Assistance” directory tool and to gain full access to the Entity portal.

- Step-1: Click on the ‘Account’ tab and select ‘Registration Status’.



- Step-2: The following screen displays the Registration Status for the Entity organization.



Document Revision History

Version	Issue Date	Changes	Drafted	Approved
2.0	09/07/2022	Updated – September 2022	Scott Yeager	09/26/2022