Entity User Reference Manual

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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 4
2. Home Page 4
   - 2.1 Add Assister 4
     - 2.1.1 Add New Assister 4
   - 2.2 Edit Assister Information 8
     - 2.2.1 Add or update Certified Assister information 8
     - 2.2.2 View Certified Assister profile 11
     - 2.2.3 Update Certified Assister activity status 12
3. Certified Assisters 14
   - 3.1 Manage Assisters 14
4. Delegations 14
   - 4.1 Pending Delegation Requests (New Designation Request) 14
     - 4.1.1 View and search for pending delegation requests 15
     - 4.1.2 Accept or decline individual delegation request 16
   - 4.2 Active Customers (Existing Designations) 17
     - 4.2.1 View and search for active designations 18
     - 4.2.2 Change customer delegation from one Assister to another Assister 19
     - 4.2.3 Change multiple customer delegations from one Assister to another Assister 23
     - 4.2.4 Perform actions on customer profile 25
       - 4.2.4.1 View individual summary 25
       - 4.2.4.2 Provide comments on individual profile 26
       - 4.2.4.3 Update comments on individual profile 29
     - 4.2.5 Mark an individual as inactive 31
   - 4.3 Inactive Customers (Undesignated Customers) 33
     - 4.3.1 View and search for inactive customers 33
5. Account 34
   - 5.1 Entity Information 35
     - 5.1.1 Edit entity information 35
   - 5.2 Populations Served 36

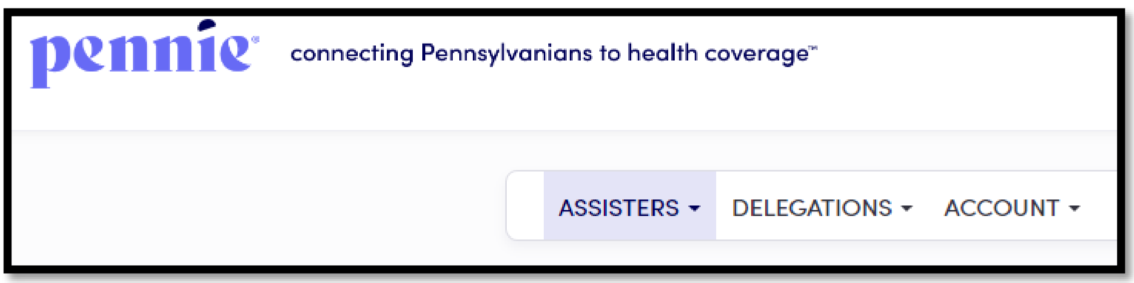
5.2.1 Edit populations served information 36
5.3 Location and Hours 38
5.3.1 Edit Primary Site information 38
5.3.2 Edit Sub-Site information 40
5.3.3 Add sub-site information 41
5.4 Contact Information 42
5.4.1 Add or update primary contact and financial contact information 42
5.5 Assisters 44
5.5.1 Add an Assister 44
5.5.2 Add or update an Assister's information 45
5.6 Document Upload 46
5.7 Payment Information 46
5.8 Registration Status 46
Document Revision History 48

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 Assisters of the organization, submit applications and enrollments and perform account maintenance transactions on behalf of the Assisters 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 Assisters associated with the Entity organization, allows the Entity to add new Assisters, view and search for Assisters associated with the organization, and edit Assister information.

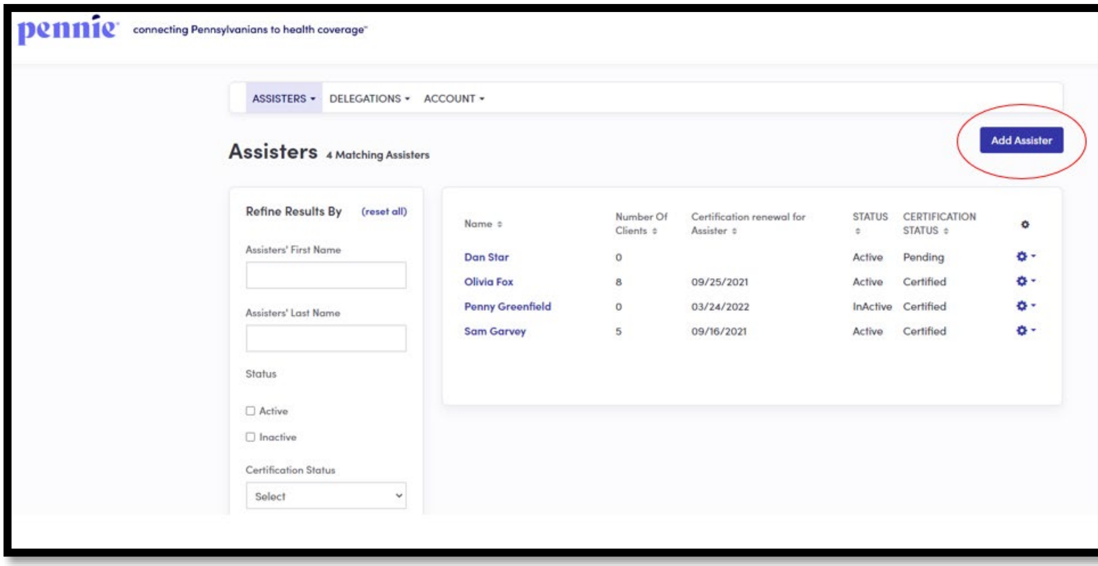
2.1 Add Assister

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

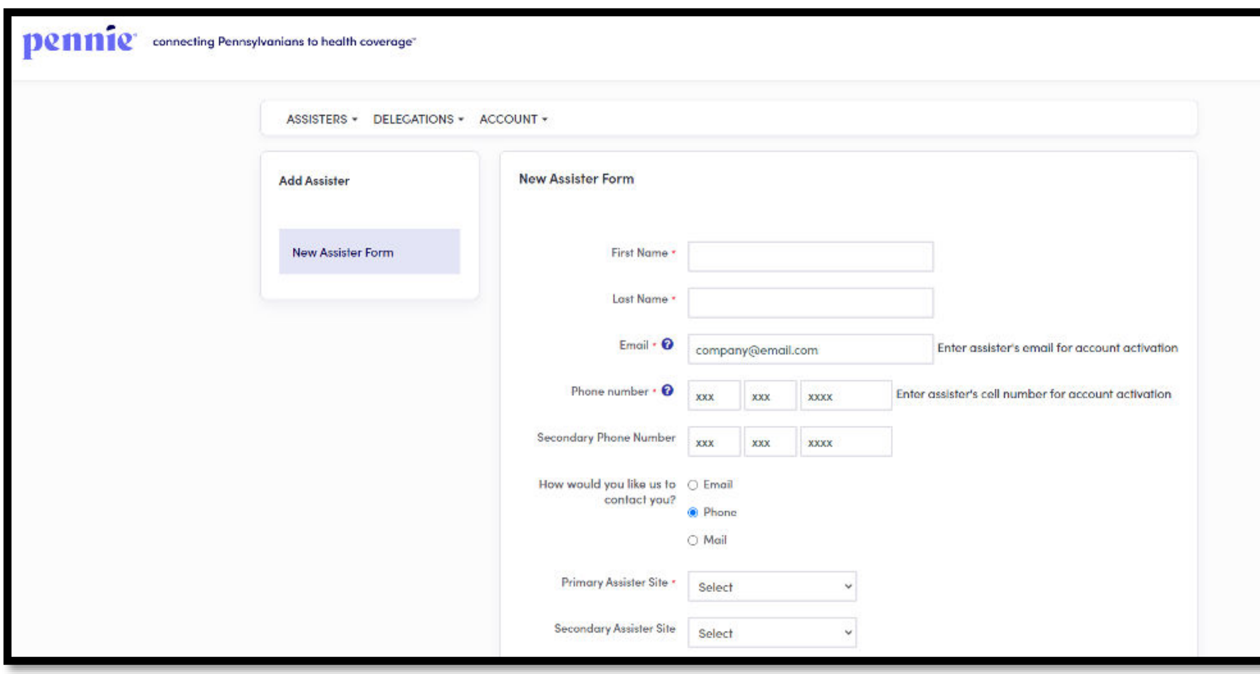
PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assisters will not receive the invitation email to claim their account until the Assister Administrator (Admin) has updated their certification status to “Certified.”

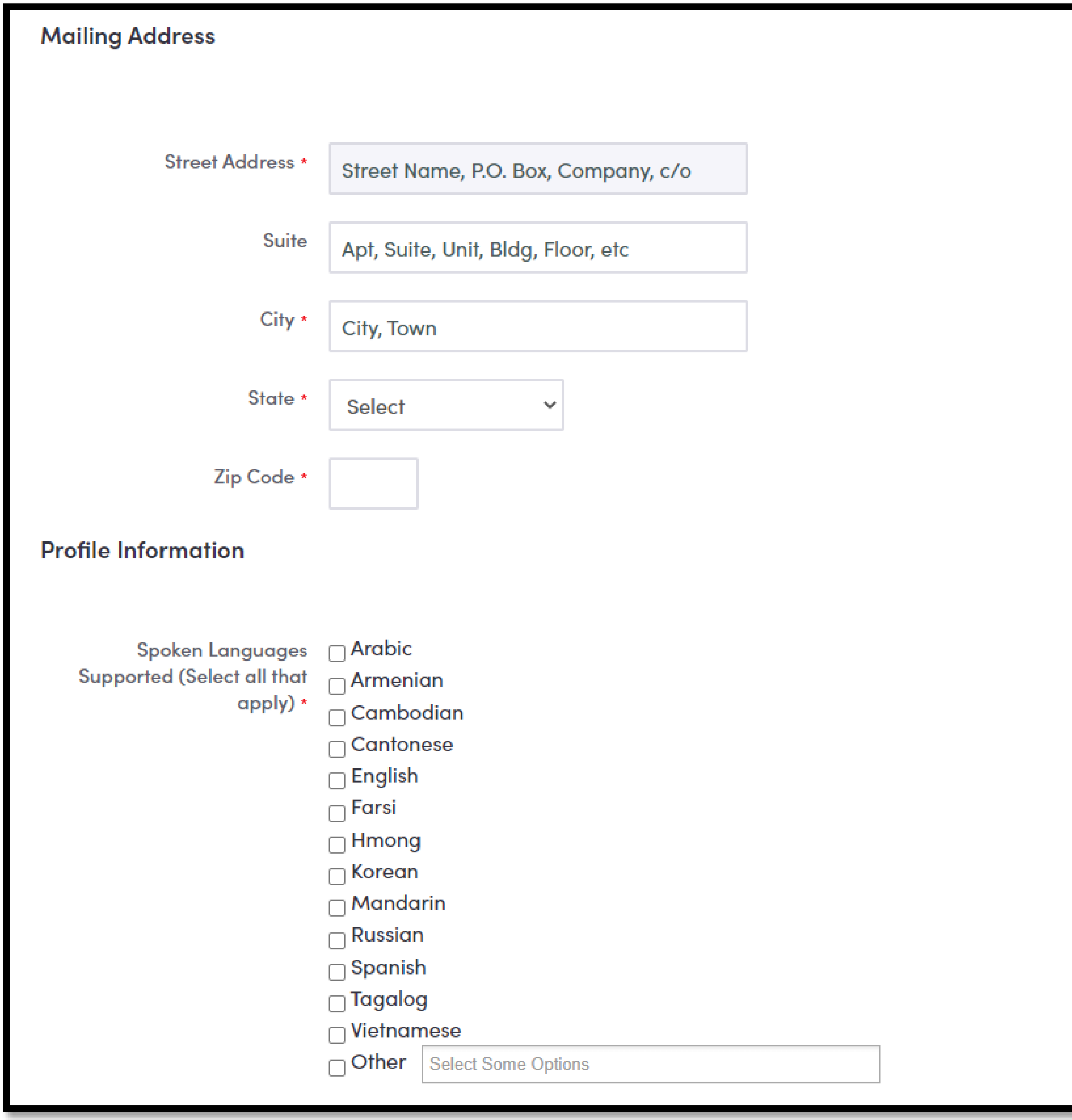
2.1.1 Add New Assister

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



- 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.





Mailing Address

Street Address *
Street Name, P.O. Box, Company, c/o

Suite
Apt, Suite, Unit, Bldg, Floor, etc

City *
City, Town

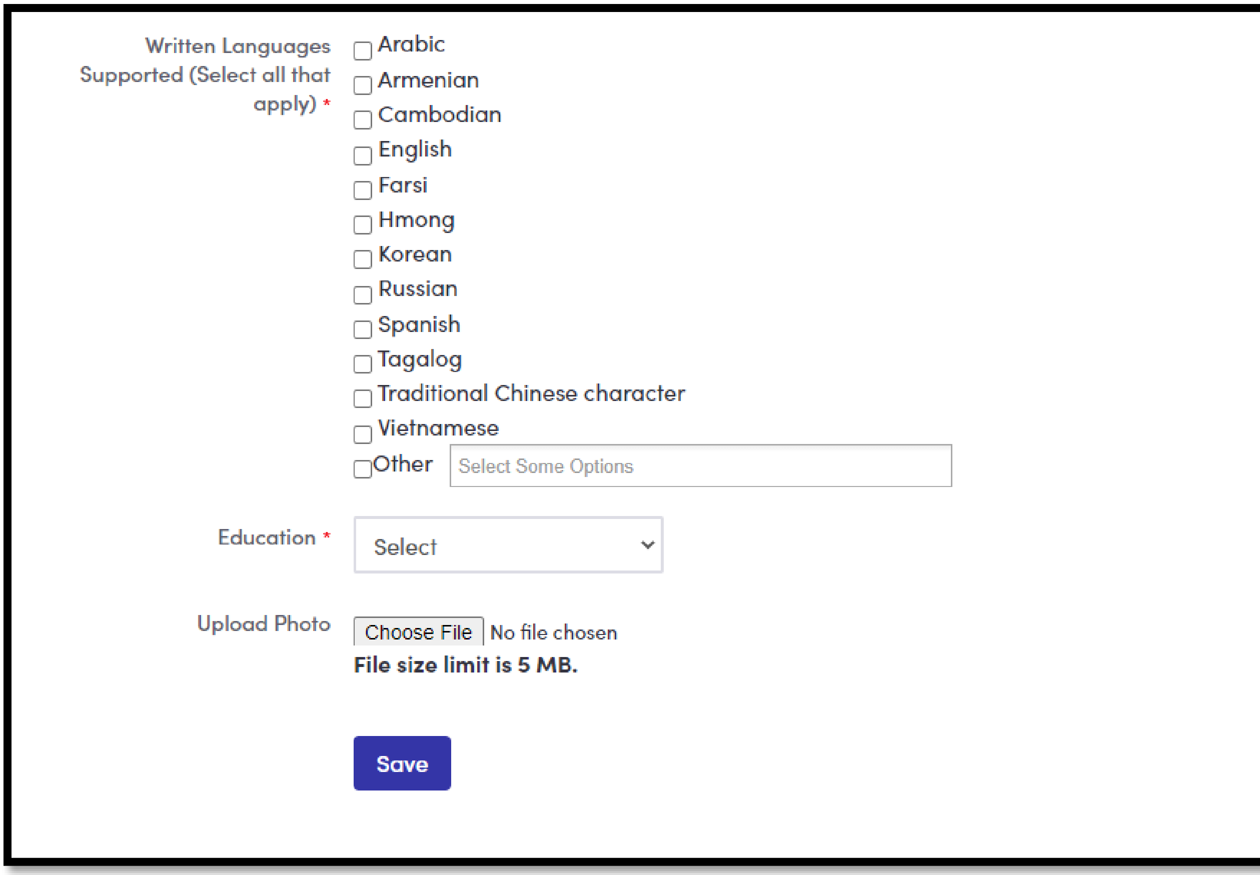
State *
Select

Zip Code *

Profile Information

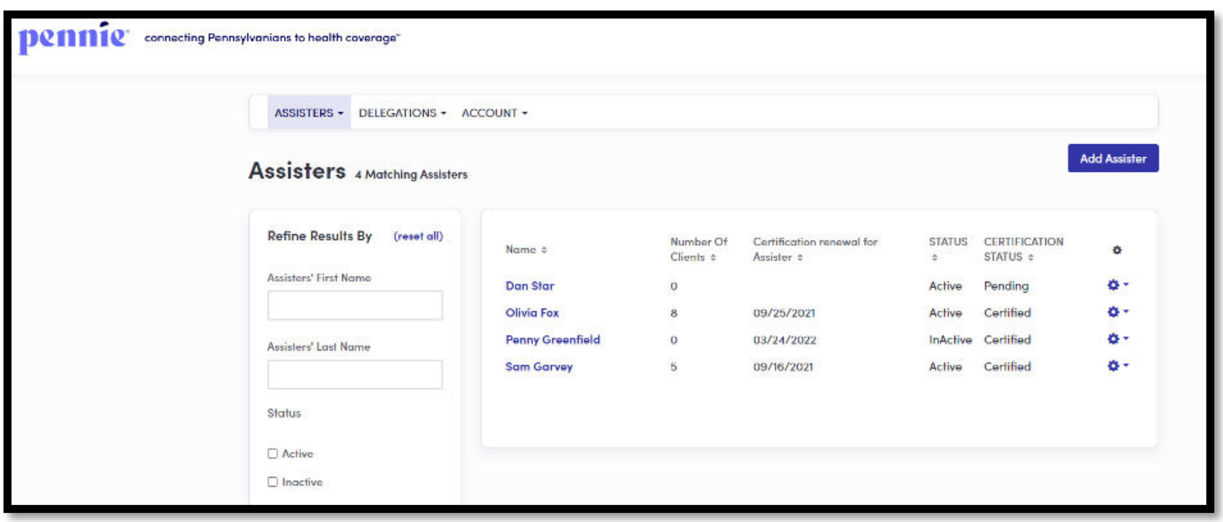
Spoken Languages Supported (Select all that apply) *

- Arabic
- Armenian
- Cambodian
- Cantonese
- English
- Farsi
- Hmong
- Korean
- Mandarin
- Russian
- Spanish
- Tagalog
- Vietnamese
- Other Select Some Options

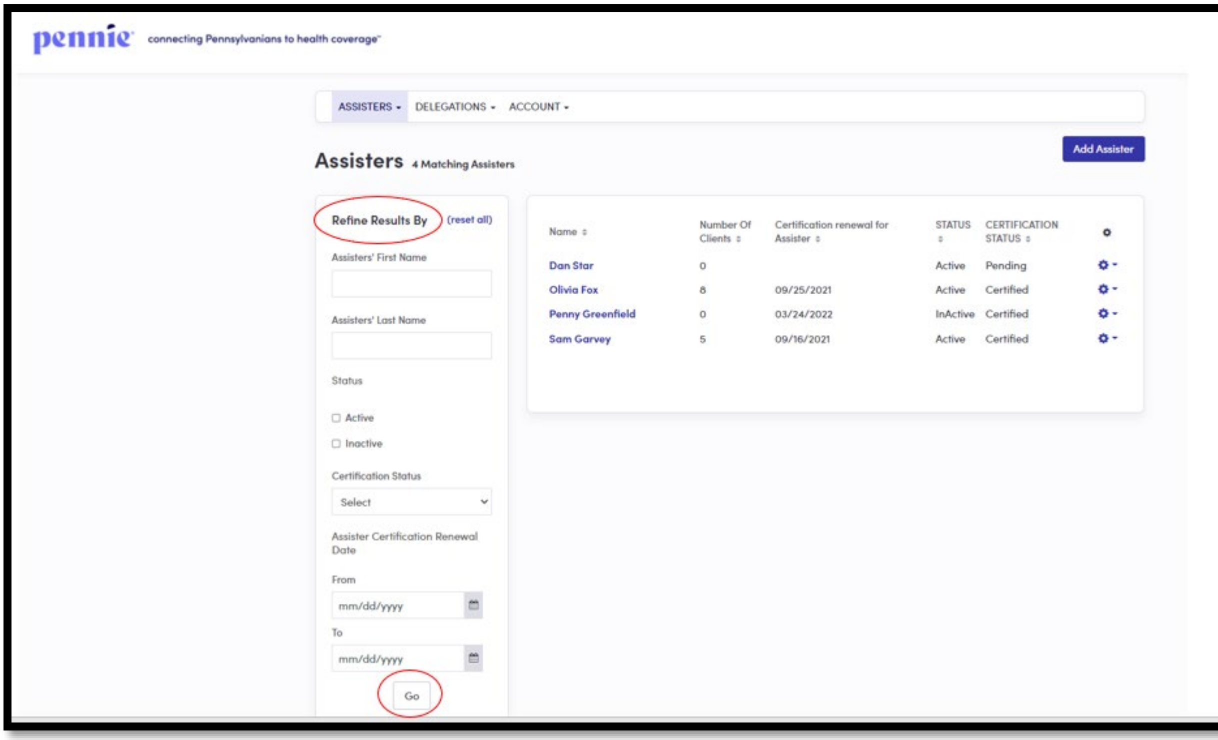


View and Search for Assisters

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



- Step-2: Search Assisters 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.

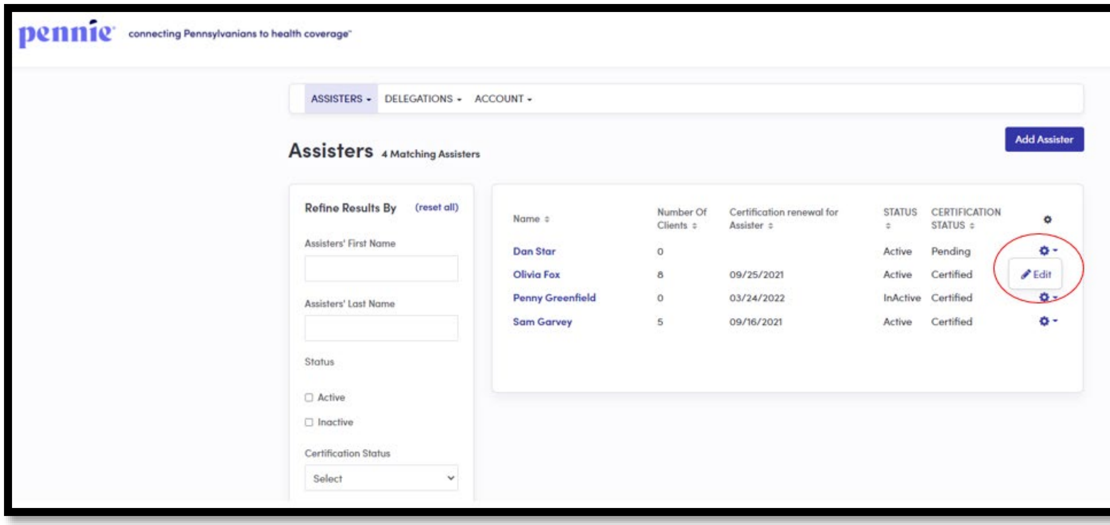


2.2 Edit Assister Information

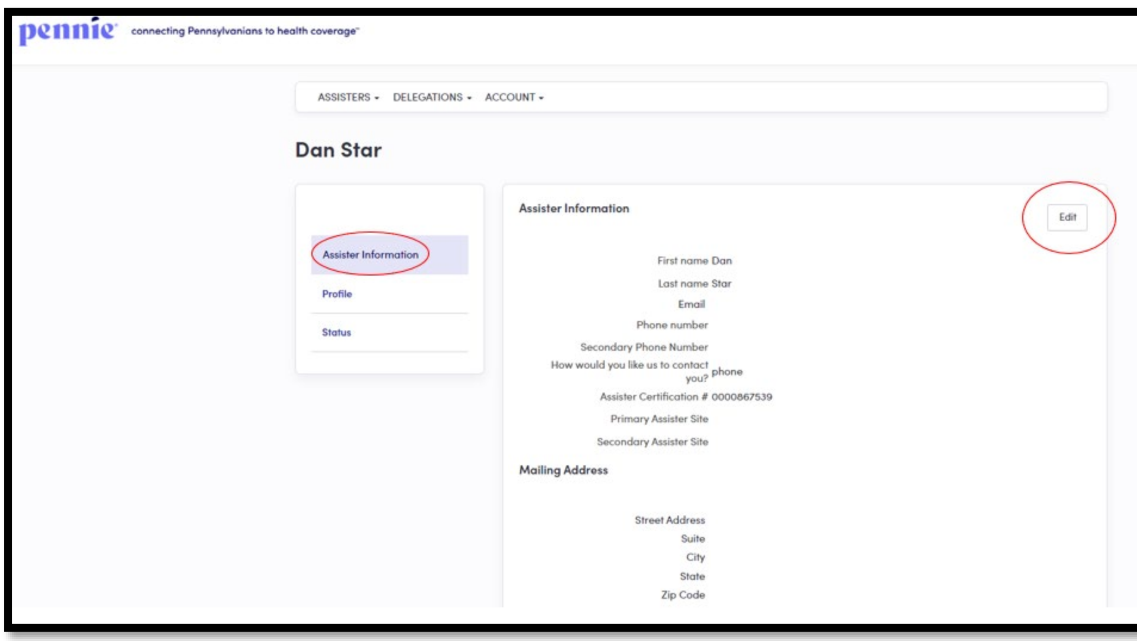
The Edit Assister information section helps the Entity in managing the Assister information, view Assister profile, and update the Assister activity status.

2.2.1 Add or update Certified Assister information

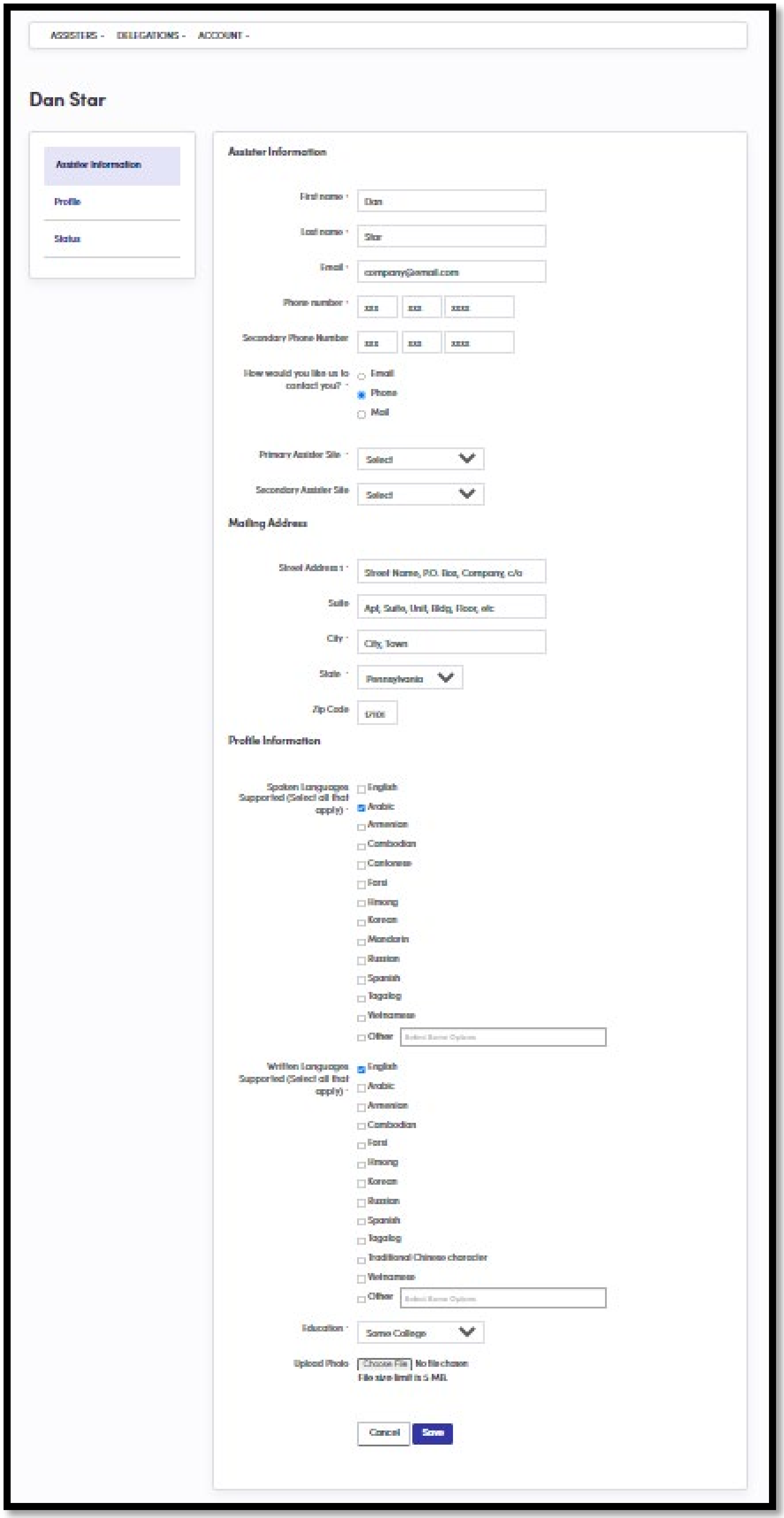
- Step-1: Click on  and click on the 'Edit' button on the home page.



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

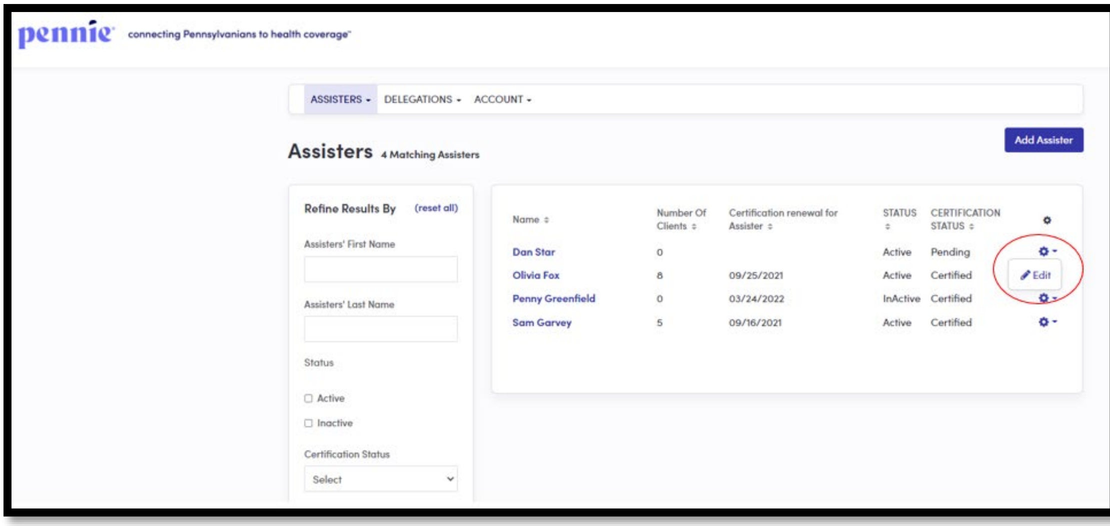


Step-3: Enter the Assister Information (e.g., "First Name" or "Phone Number"), Mailing Address and Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported") and click on the 'Save' button.

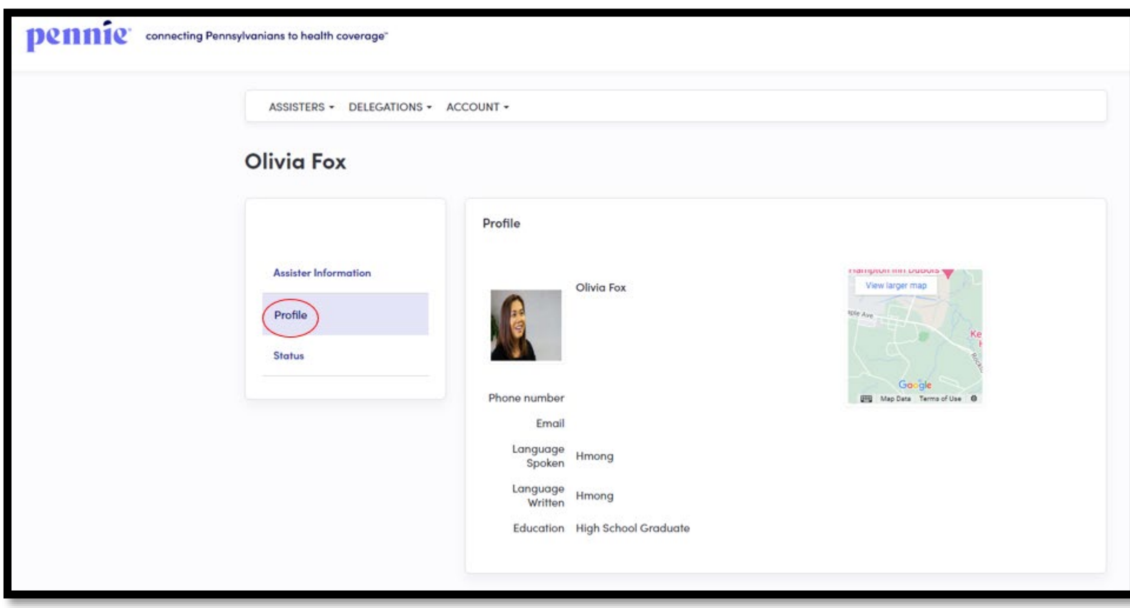

ASSISTERS - DELEGATIONS - ACCOUNT -
Dan Star
Assister Information
Profile
Status
Assister Information
First name *
Dan
Last name *
Star
Email *
company@email.com
Phone number *
Secondary Phone Number
How would you like us to contact you? *
Email
Phone
Mail
Primary Assister Site *
Select
Secondary Assister 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
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 *
Some College
Upload Photo
Choose File No file chosen
File size limit is 5 MB.
Cancel
Save

2.2.2 View Certified Assister profile

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

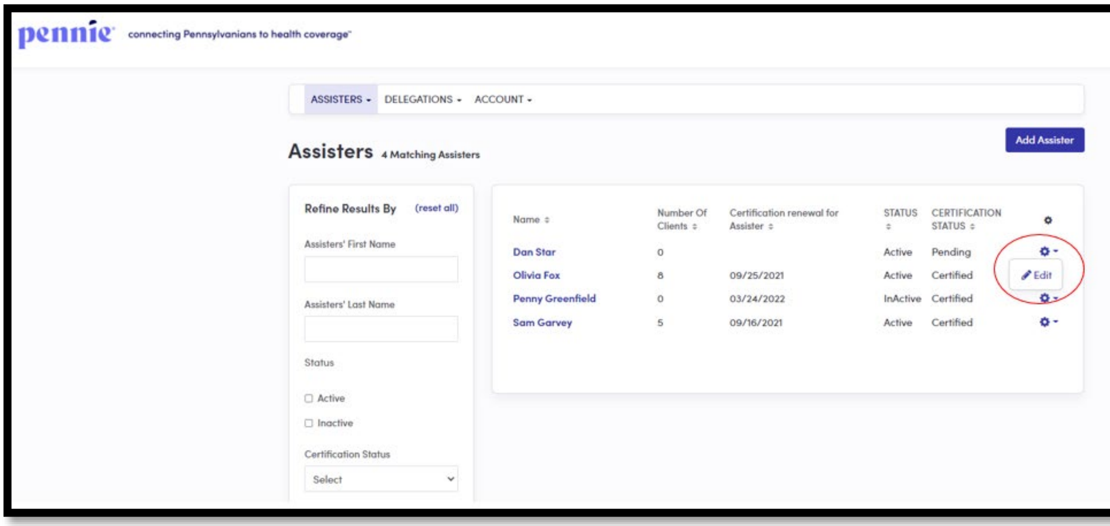


- Step-2: Click on the "Profile" section and the following screen will display the Assister's profile information.

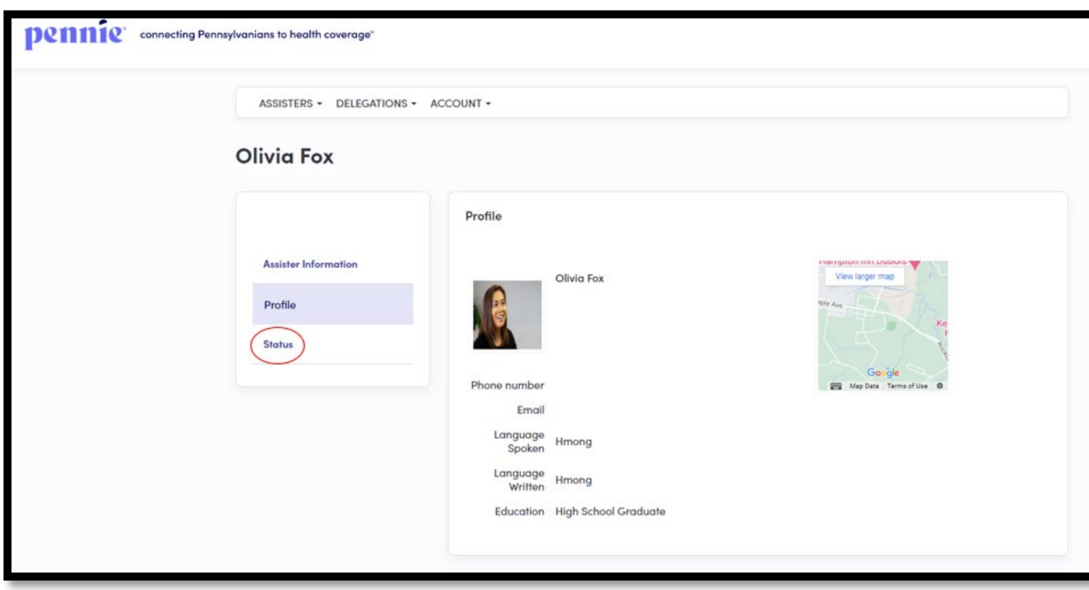


2.2.3 *Update Certified Assister activity status*

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

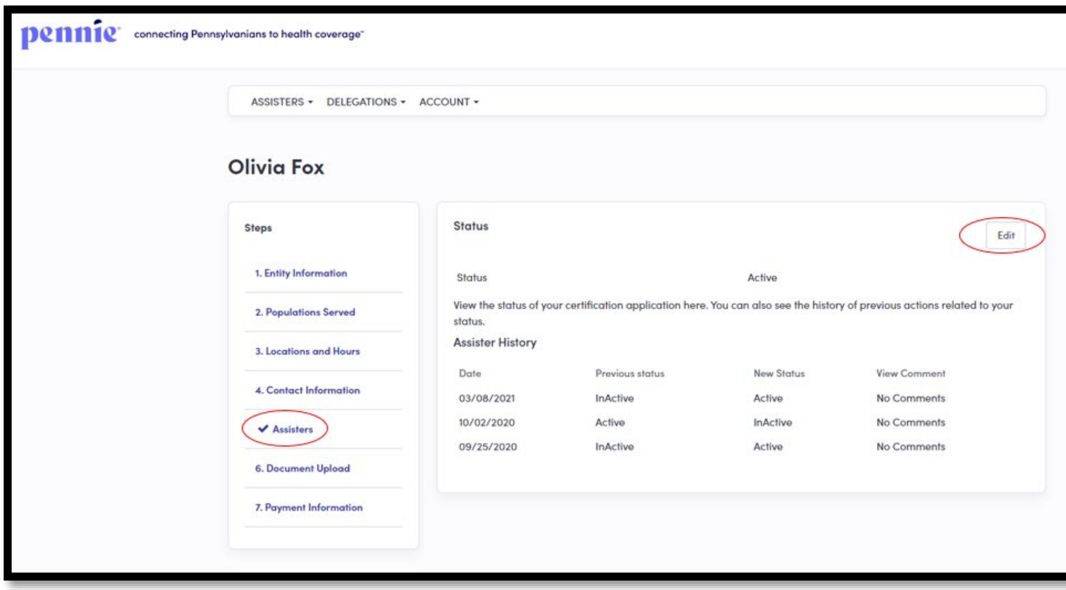


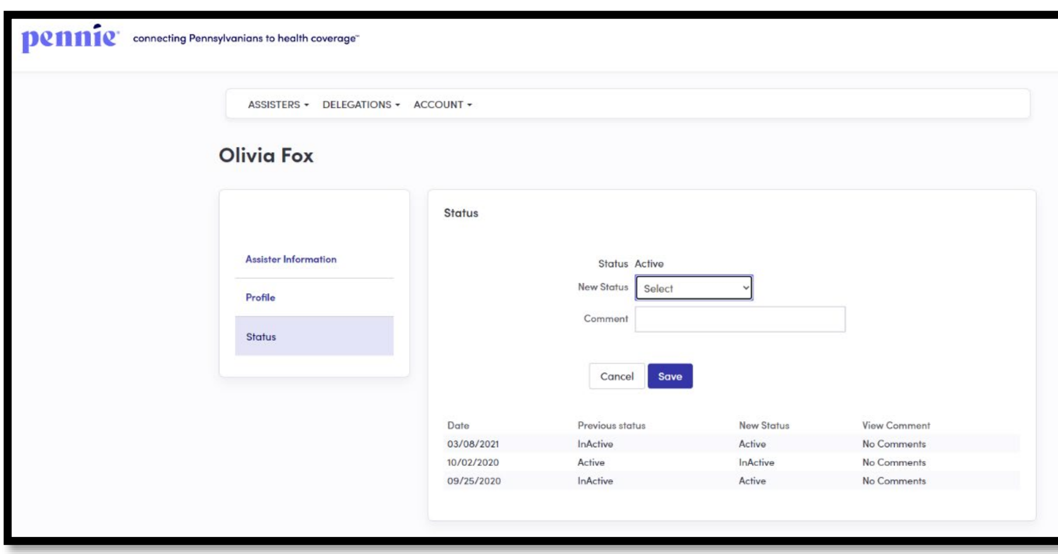
- Step-2: Click on the “Status” section and click on ‘Edit’ button.



- 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.

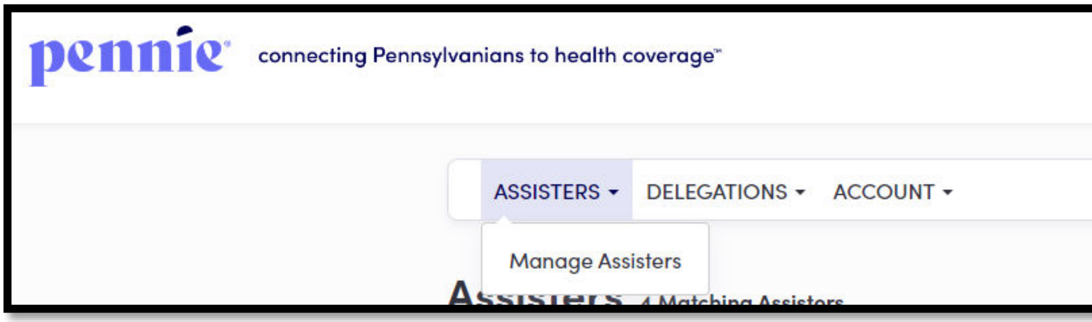




3. Certified Assisters

3.1 Manage Assisters

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



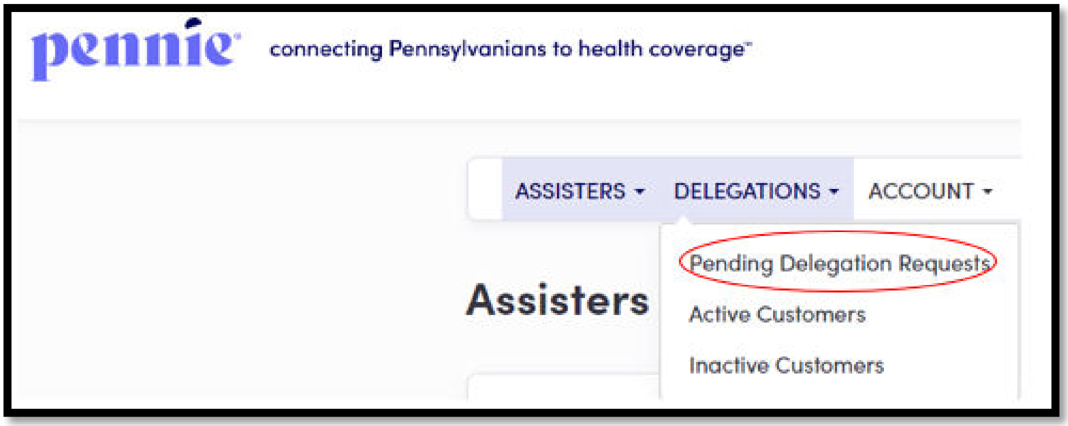
4. Delegations

4.1 Pending Delegation Requests (New Designation Request)

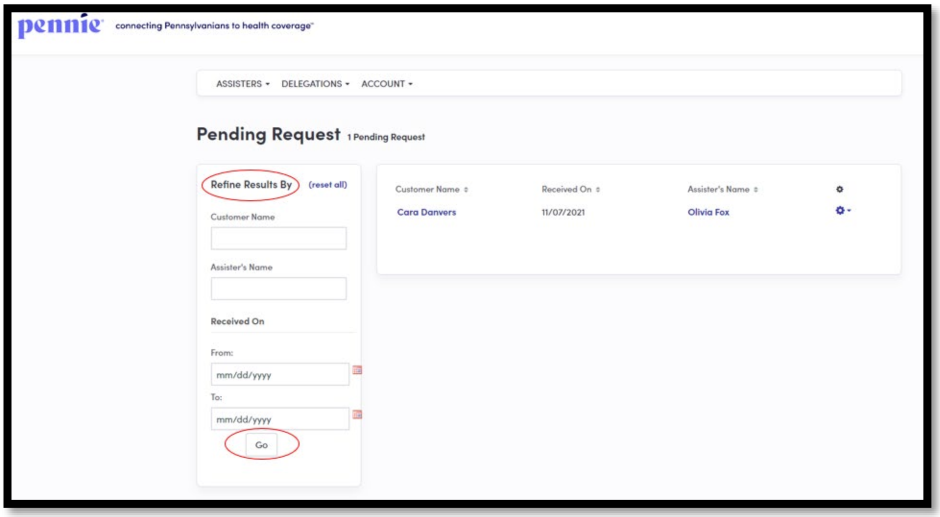
The Pending Delegation Requests section displays a list of pending customer designation requests for an Assister associated with the Entity organization. The Entity has an option to accept or decline an individual's designation request on behalf of the Assister. If the request is accepted, then the individual 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'.



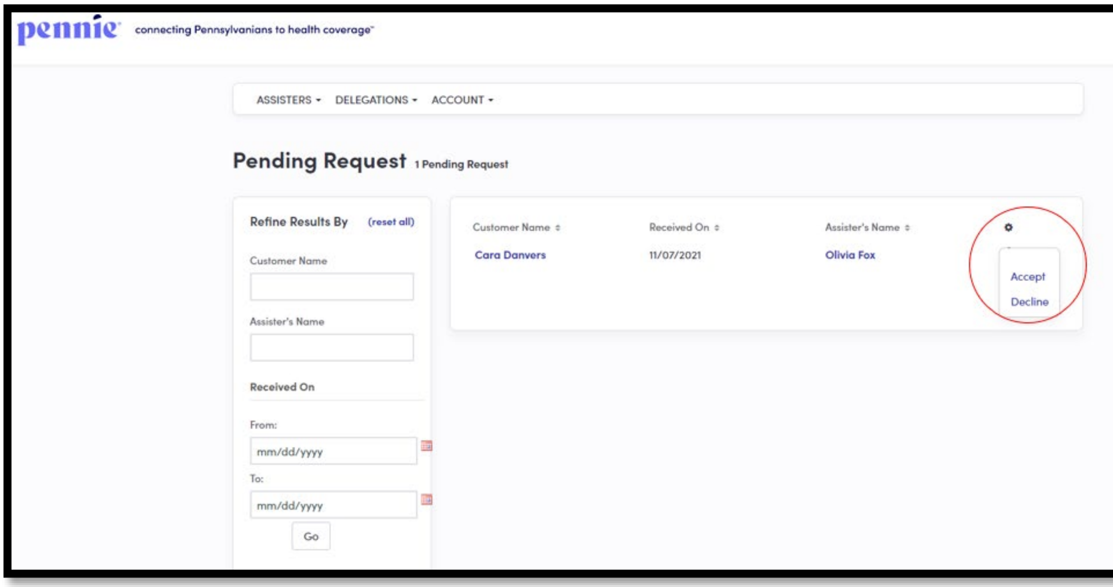
- Step-2: Enter customer's name in the 'Customer Name' field or Assister name in the 'Assister Name' field or enter the desired date range during which an individual delegation request was received in the 'Received On' section under the "Refine Results By" section and click on the 'Go' button.



4.1.2 Accept or decline individual delegation request

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

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



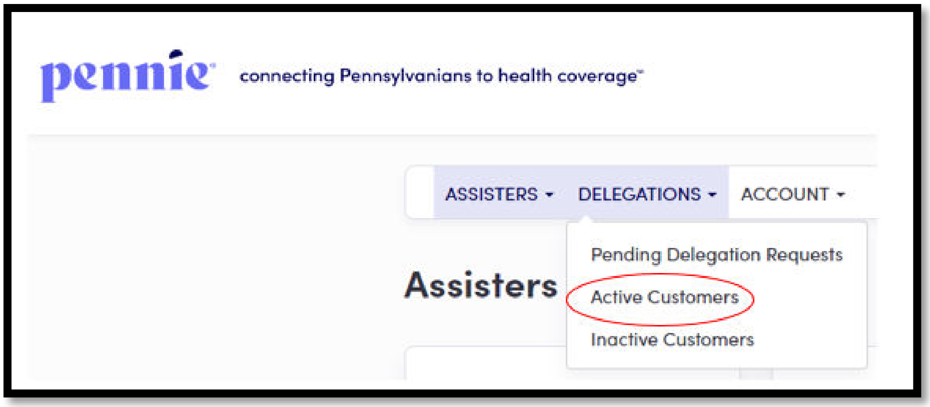
4.2 Active Customers (Existing Designations)

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.

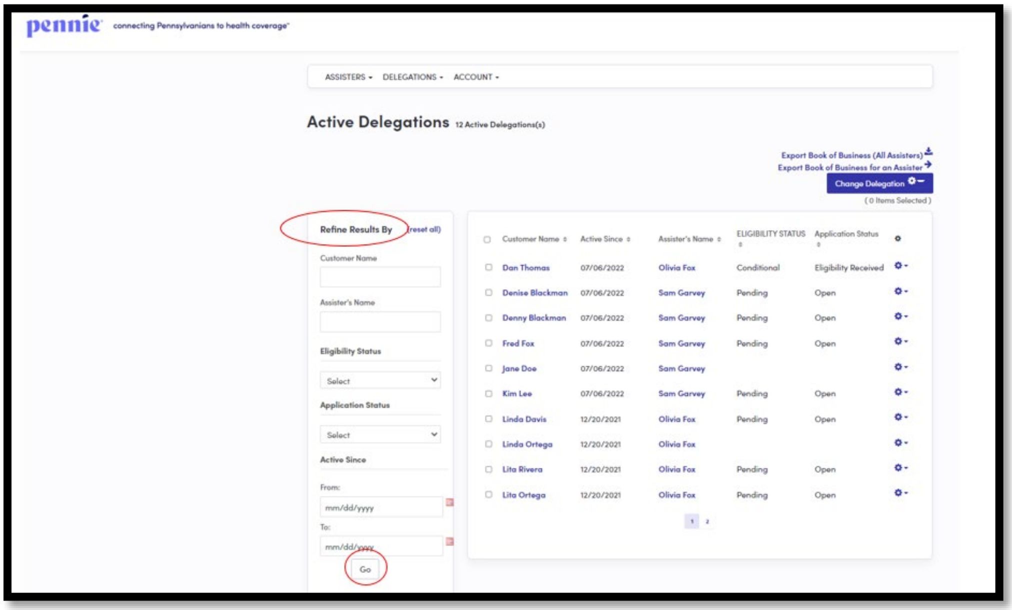
The Active Customers section helps an Entity to view and search for active individuals list, transfer customer delegation from one Assister to another within the Entity Organization, view individual summary, provide comments on an individual's profile, and mark an individual as inactive.

4.2.1 View and search for active designations

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



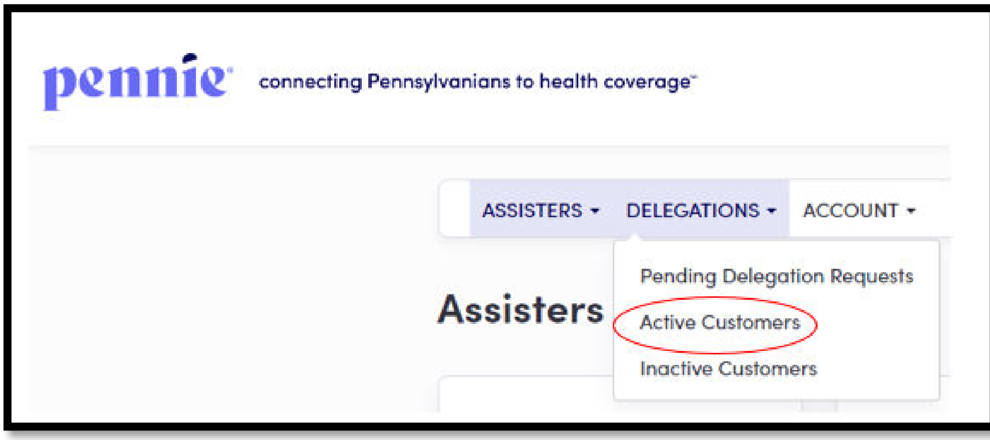
- Step-2: Search by entering the customer’s name in the ‘Customer Name’ field; Assister name in the ‘Assister Name’ field; select individual eligibility status (e.g., “Pending” or “Conditional”) from the ‘Eligibility Status’ drop-down list’ select individual application status (e.g., “Open” or “Submitted”) 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.



4.2.2 *Change customer delegation from one Assister to another Assister*

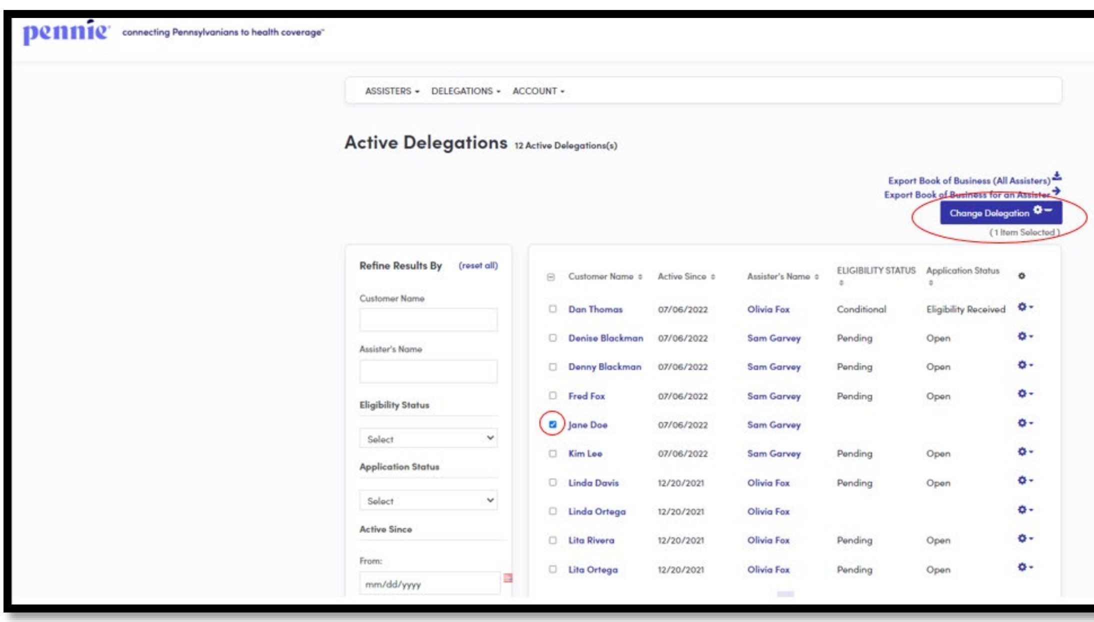
This section helps the Entity in changing a customer delegation from one Certified Assister to another within the Entity Organization. This step is performed when an Assister is no longer associated with the Entity organization.

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



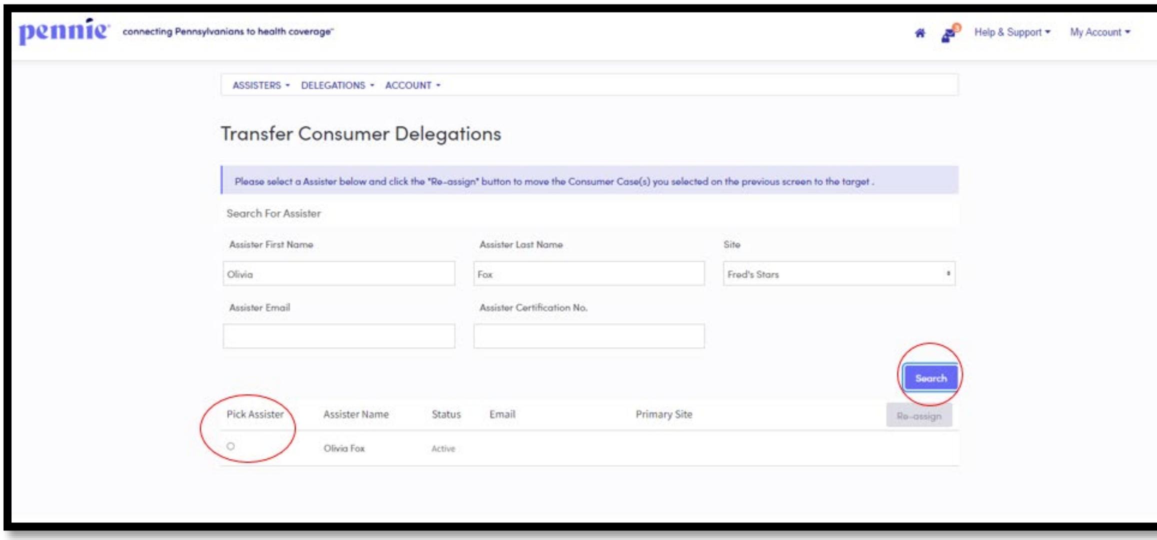
- Step-2: Select checkbox next to a customer’s name, click on the ‘Change Delegation’ button and select the ‘Change Delegation’.

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

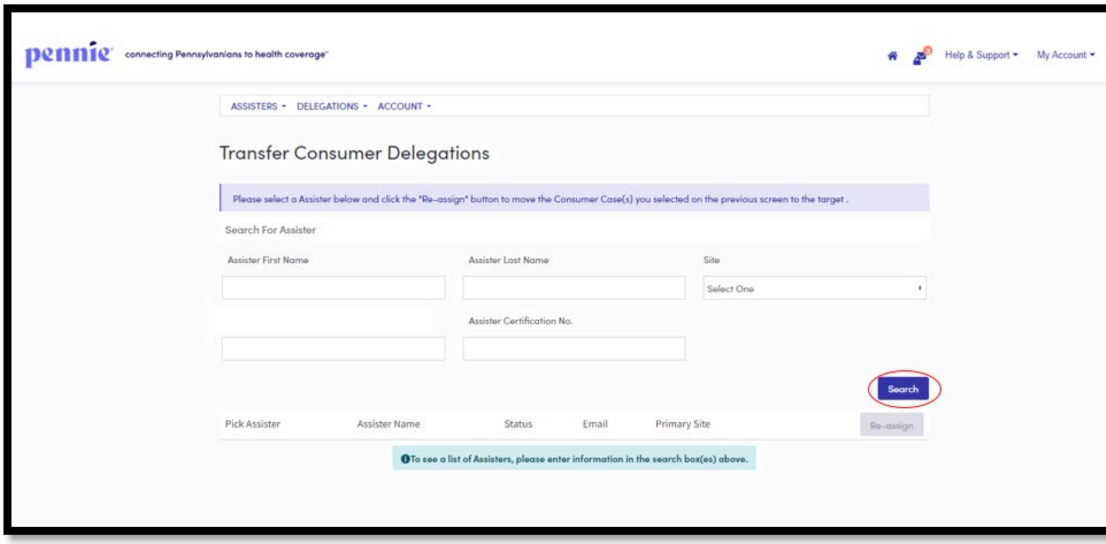


- Step-3: Enter Assister email in the ‘Assister Email’ field or Assister name in the ‘Assister Name’ or select primary site address from the ‘Primary Site’ drop-down list and click on the ‘Search’ button.

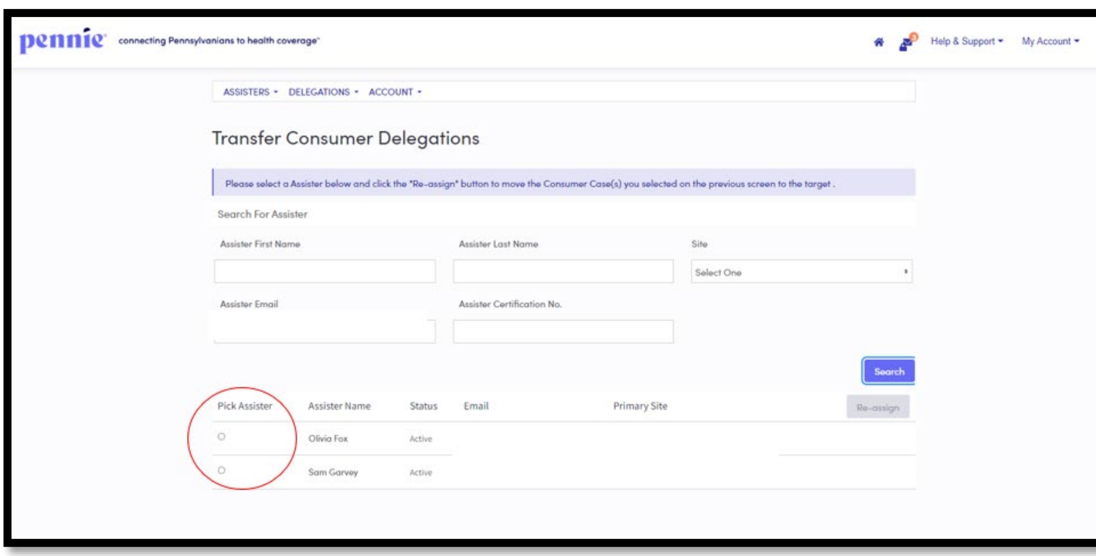
PLEASE NOTE: Only the Assisters with "Active" activity status will appear in the Assister search list.



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

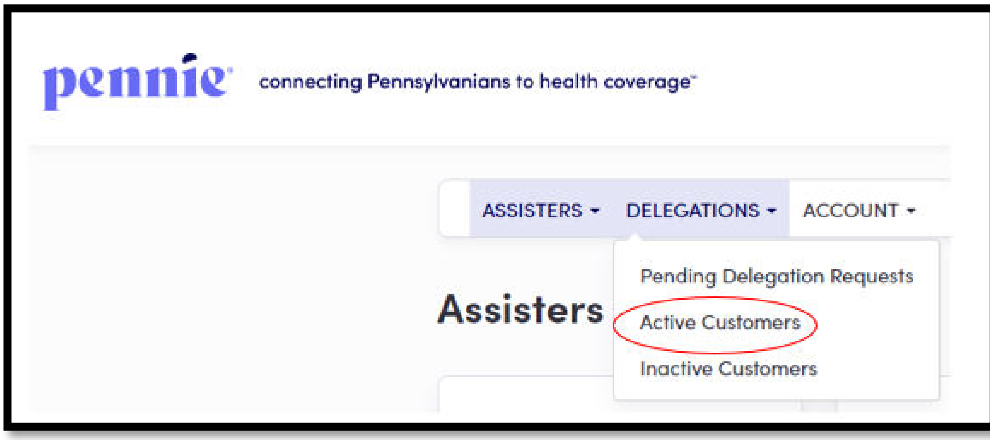


- Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.



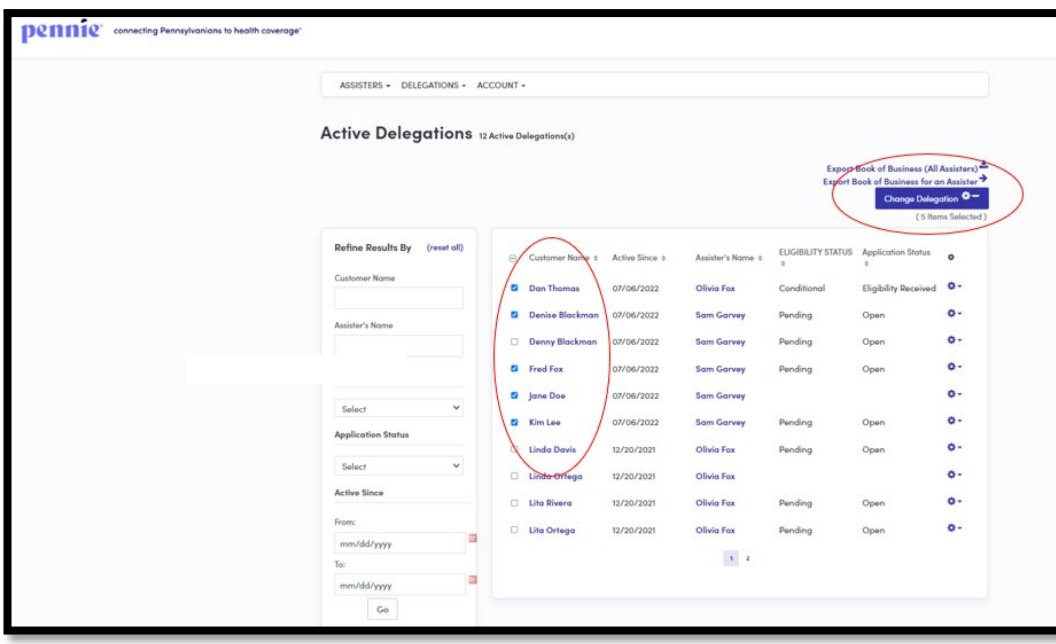
4.2.3 *Change multiple customer delegations from one Assister to another Assister*

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



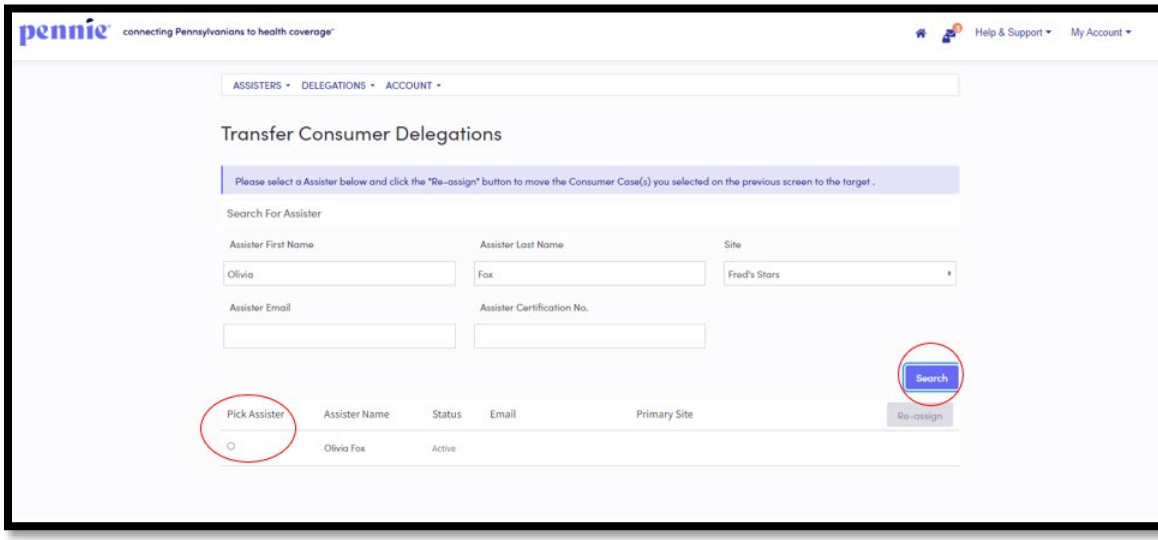
- Step-2: Select the main checkbox next to the ‘Customer Name’ title, click on the ‘Change Delegation’ button and select ‘Change Delegation’.

<u>PLEASE NOTE:</u> The ‘Change Delegation’ button is only activated when the Entity selects the checkbox next to the ‘Customer Name’ title.

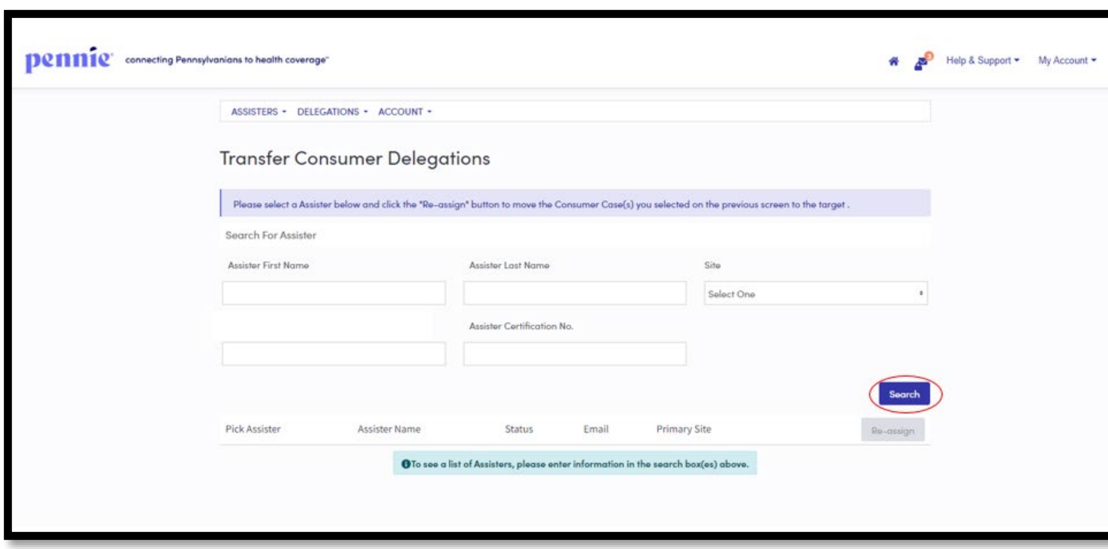


- Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

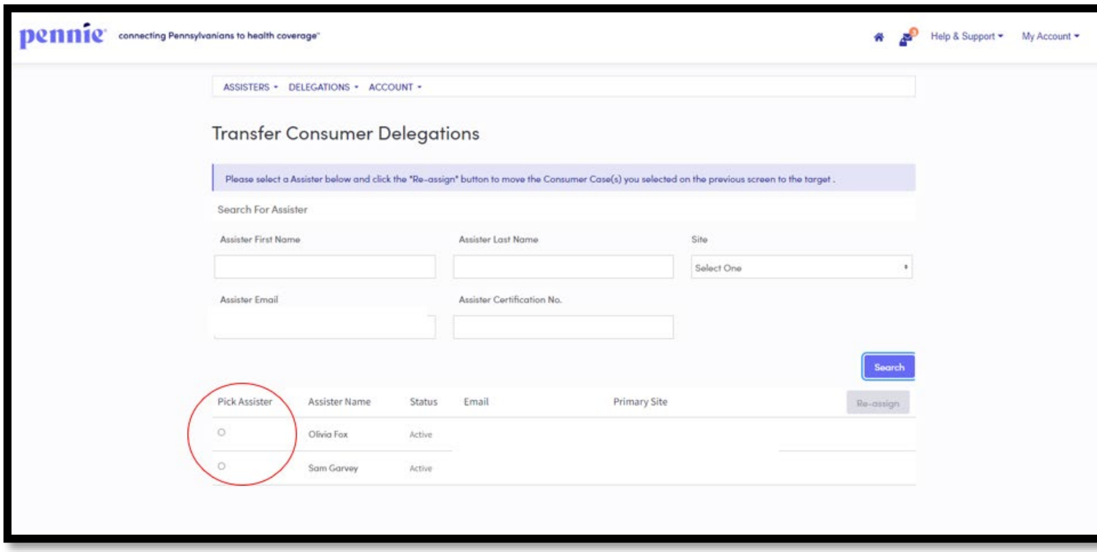
<u>PLEASE NOTE:</u> Only the Assisters with "Active" activity status will appear in the Assister search list.



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



- 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.

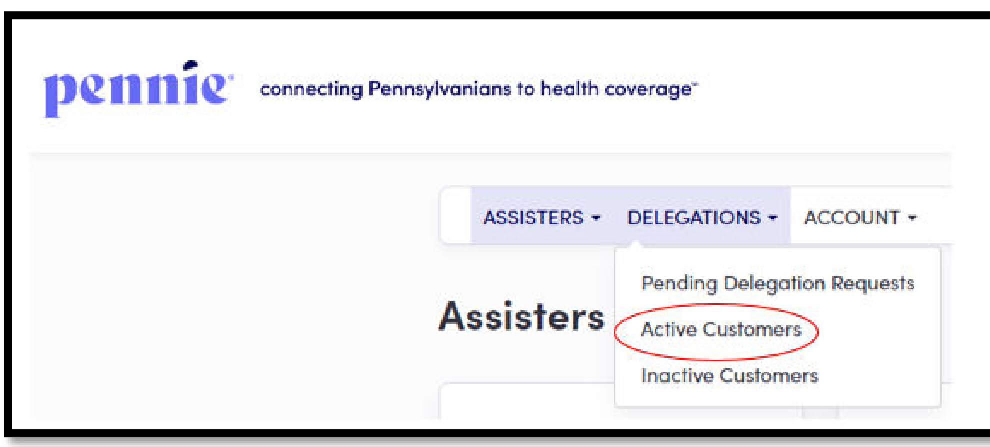


4.2.4 Perform actions on customer profile

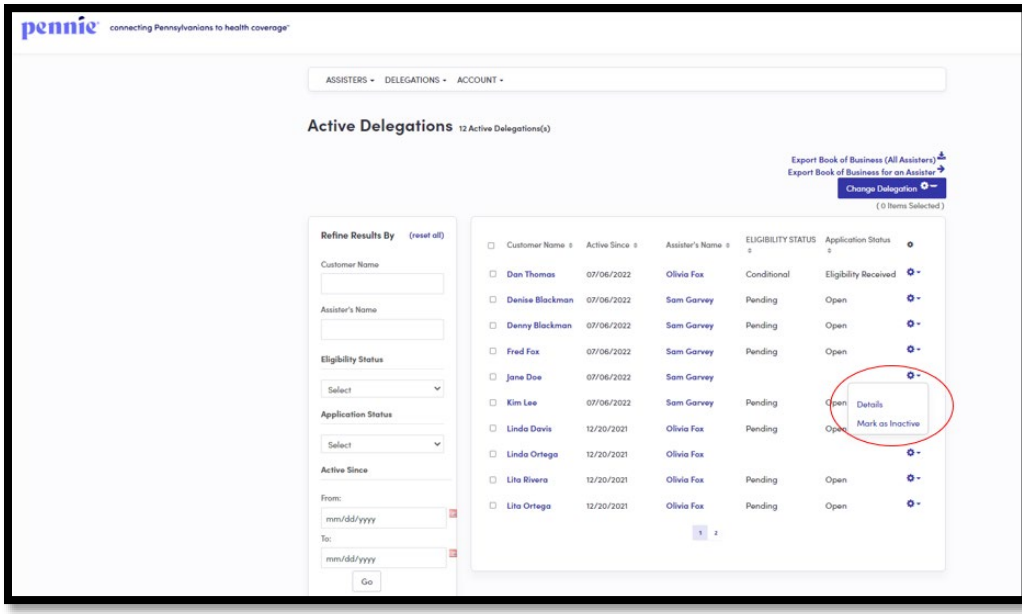
The Entities can perform actions on customer accounts which includes view customer summary, provide comments on a customer's profile, resend activation email to a customer and mark an individual as inactive.

4.2.4.1 View individual summary

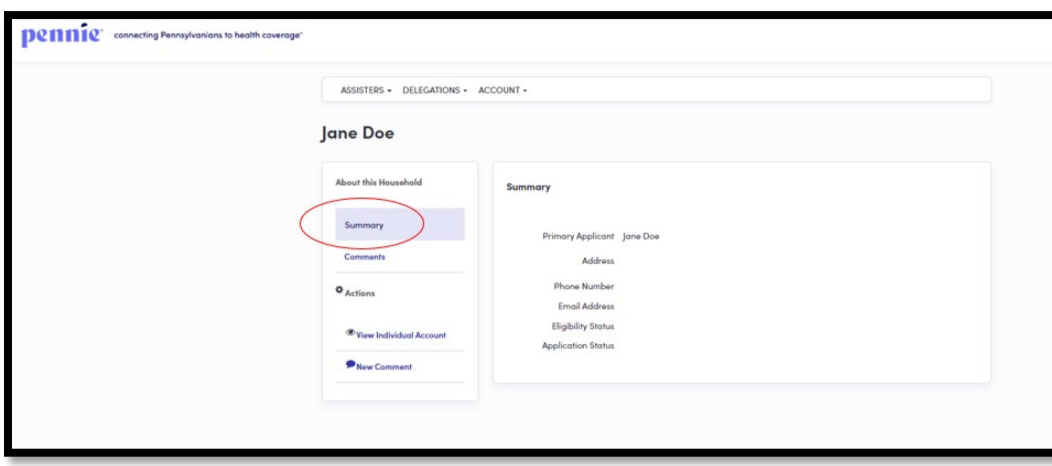
- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



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

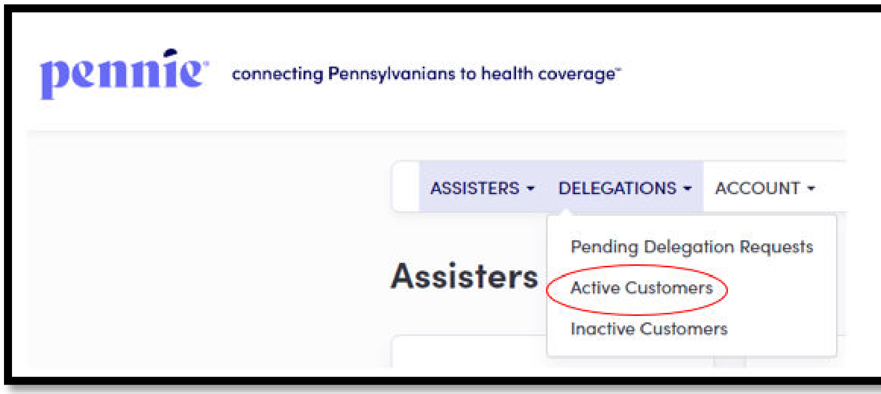


- Step-3: Go to "Summary" section and the following screen will display an individual summary.

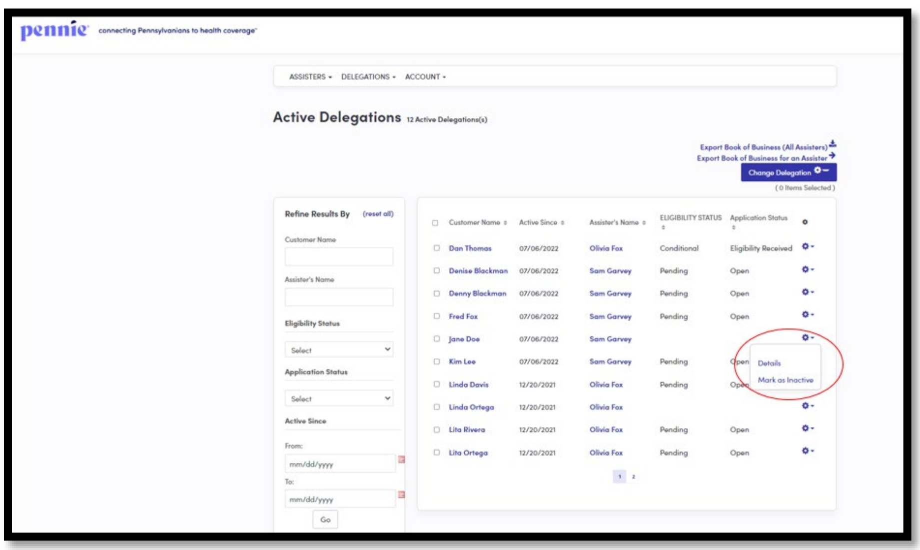


4.2.4.2 Provide comments on individual profile

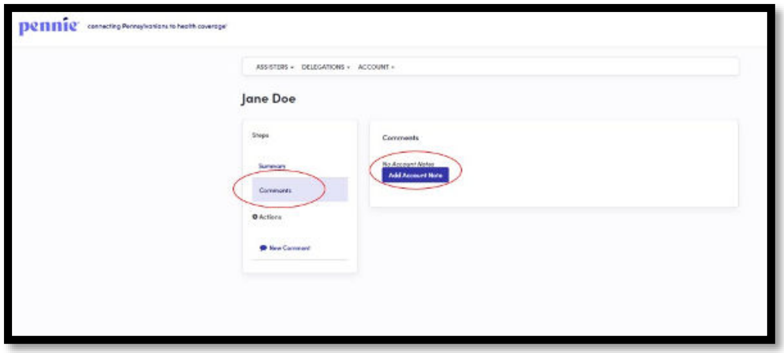
- Step-1: Click on the ‘Delegations’ tab and select ‘Active Customer’.



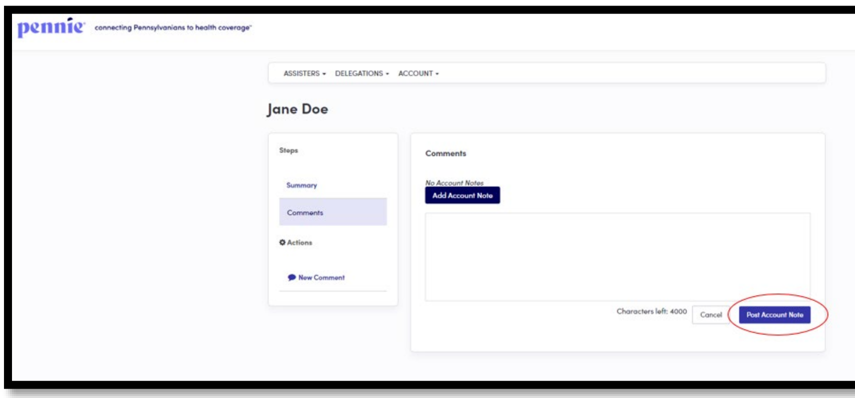
- Step-2: Click on the button and click on ‘Details’.



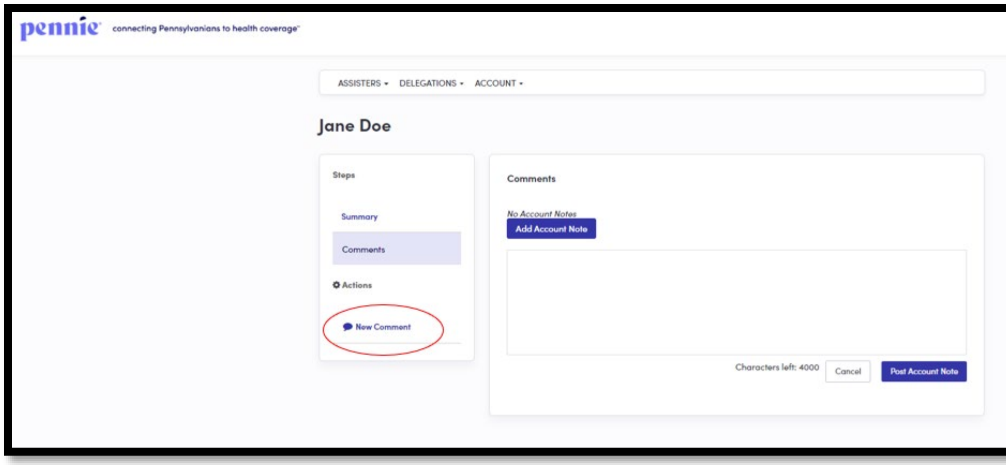
- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



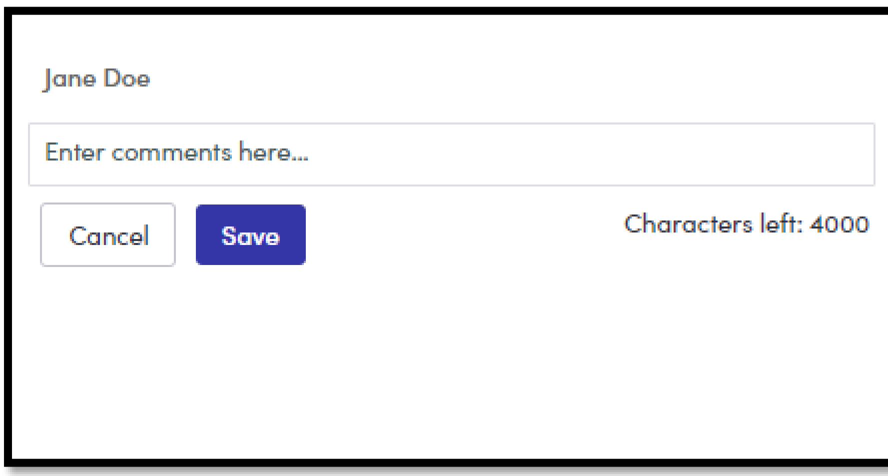
- Step-4: Provide comments in the text area and click on the ‘Post Comment’ button.



- 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.

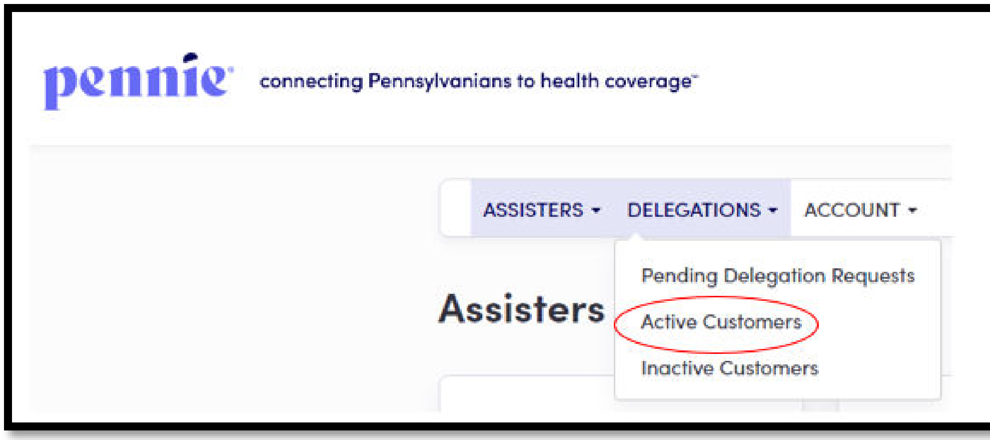


- Step-4 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the ‘Save’ button.

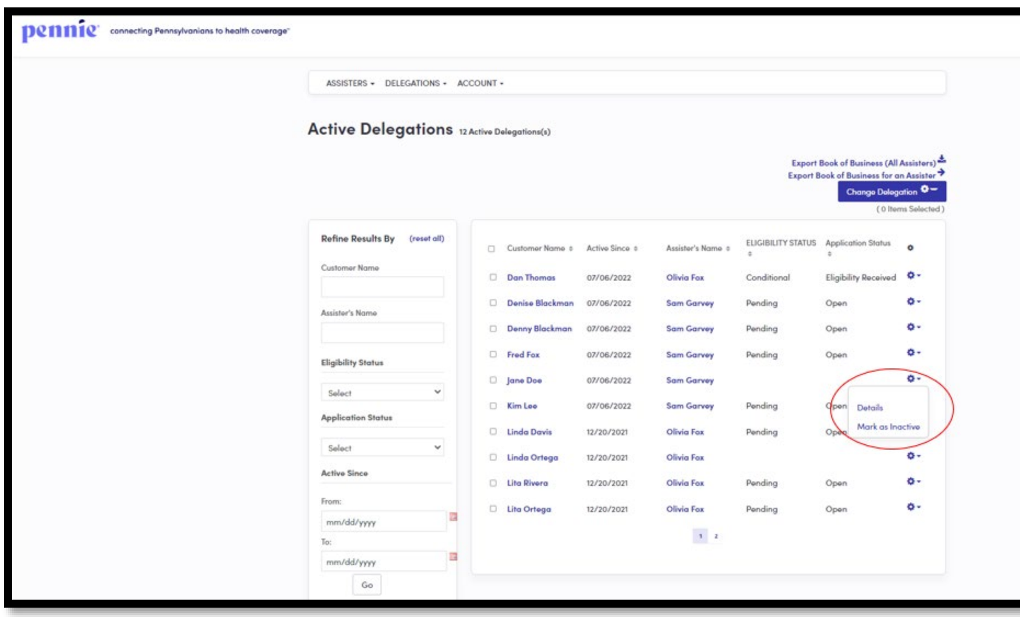


4.2.4.3 Update comments on individual profile

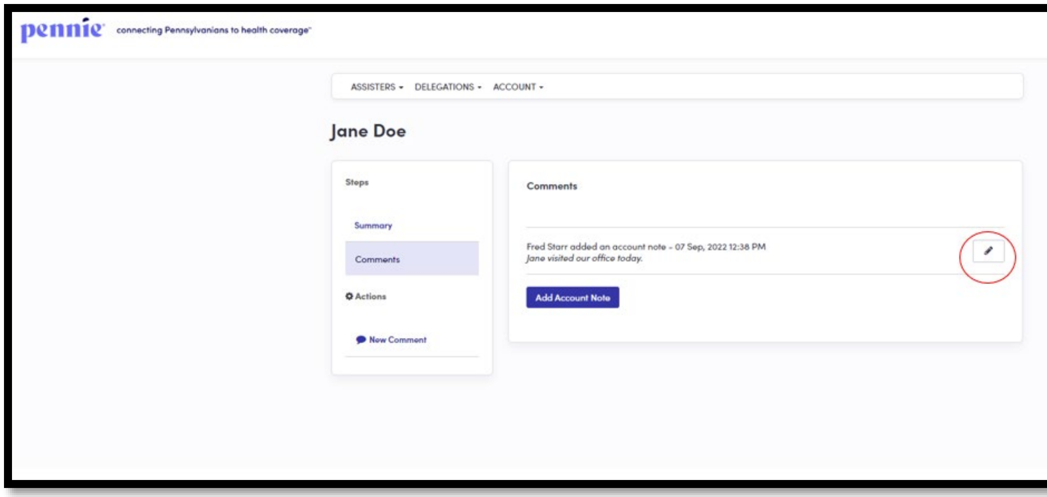
- Step-1: Click on the ‘Delegations’ tab and select ‘Active Customers’.



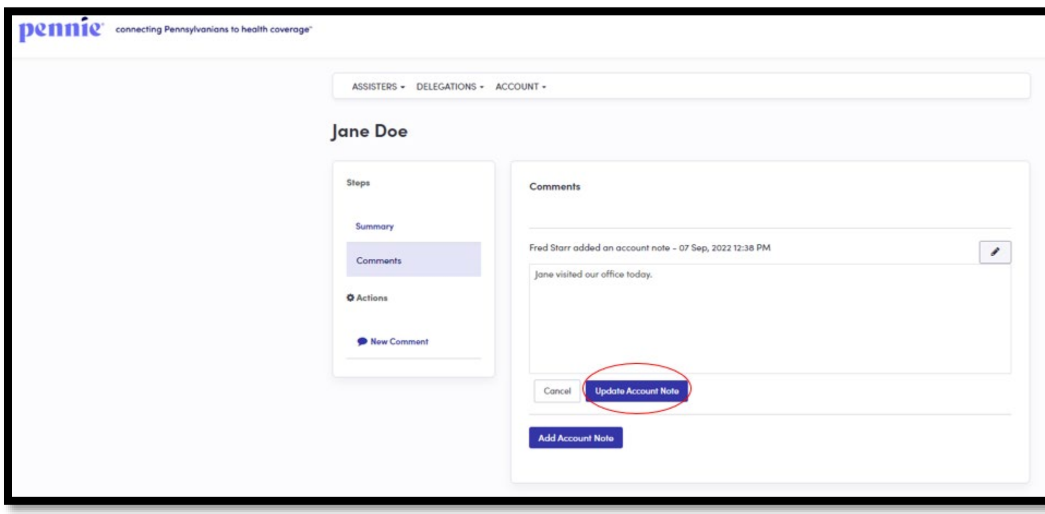
- Step-2: Click on the button and click on 'Details'.



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



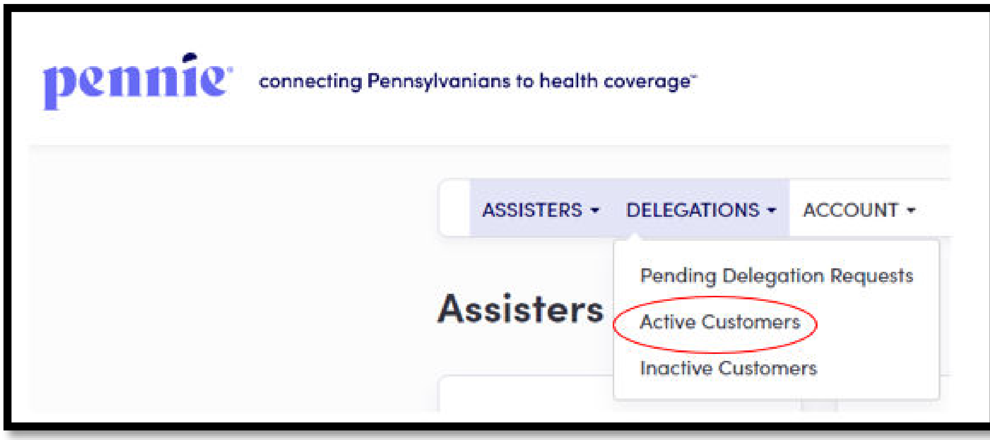
- Step-4: Enter the updated comment in the text area and click on the 'Update Comment' button.



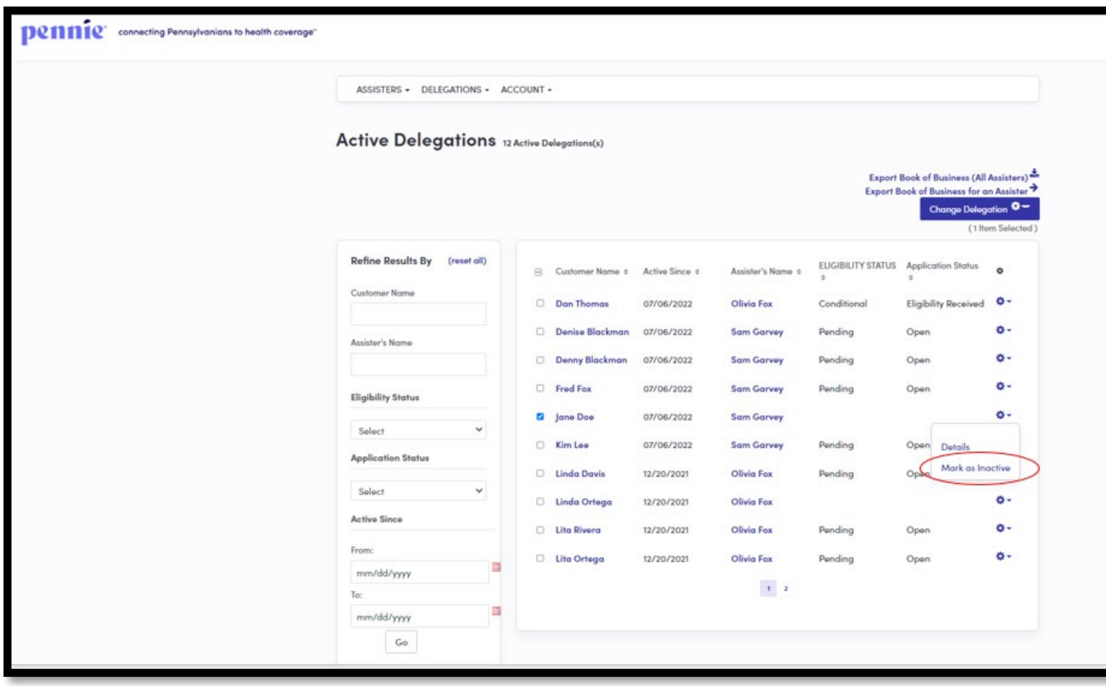
4.2.5 Mark an individual as inactive

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'.

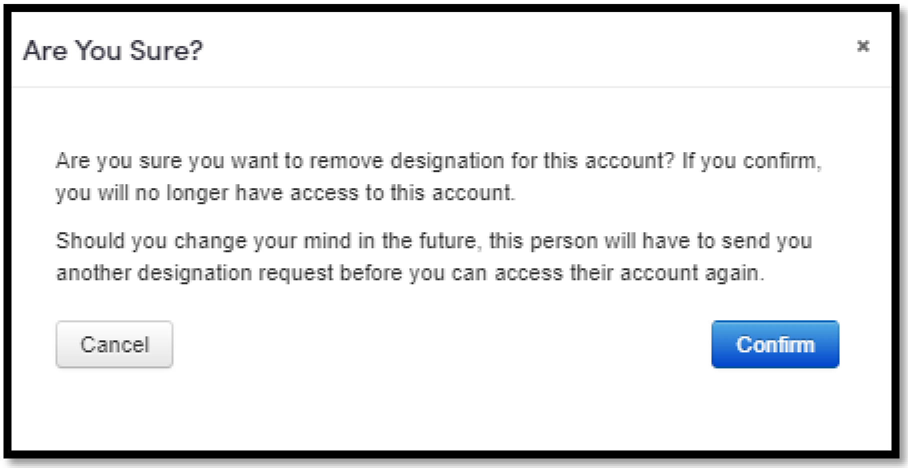


- Step-2: Click on the button and click on 'Mark as Inactive'.



- 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.

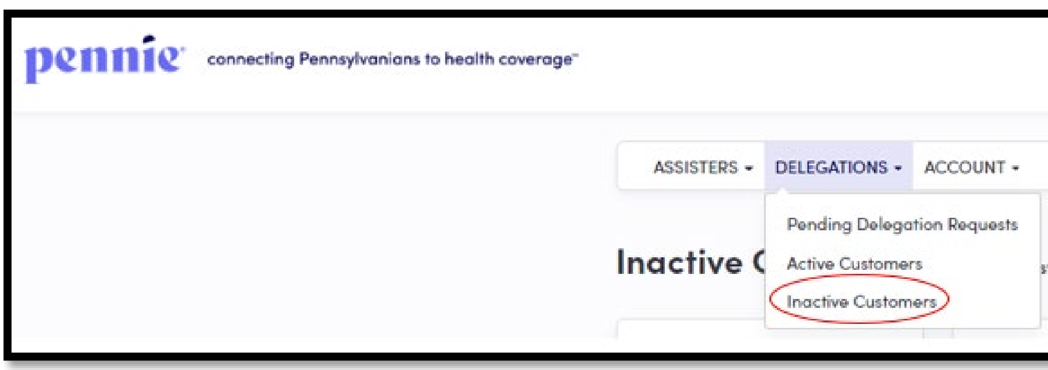


4.3 Inactive Customers (Undesignated Customers)

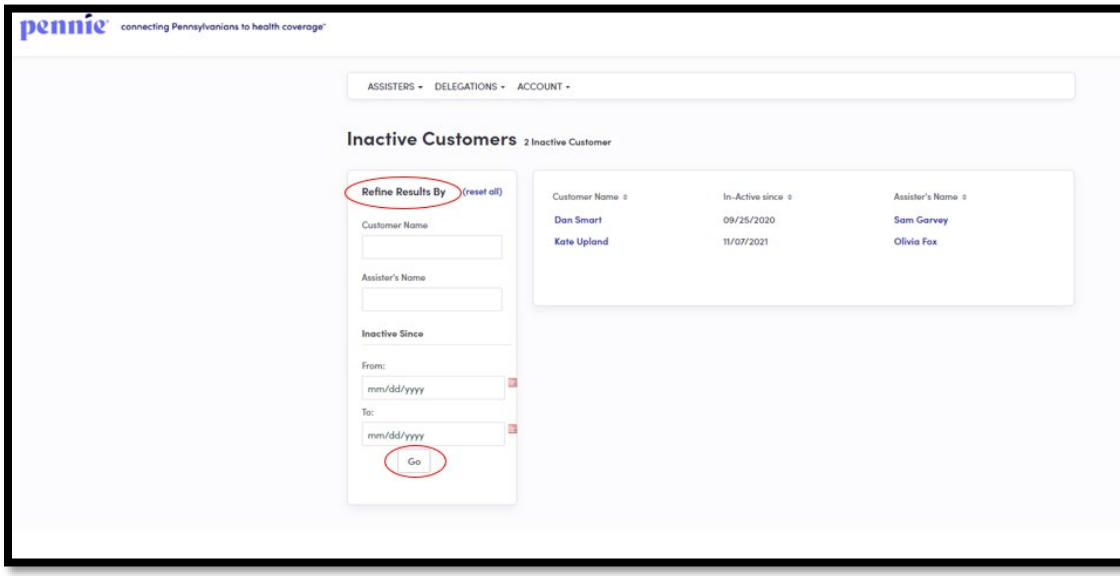
The Inactive Customers section displays the list of individuals whose delegation requests were declined, were marked as inactive by their Entity organization or Assister, or the individual de-designated the Assister. The Entity can view and search the list of inactive individuals, filtered by Customer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



5. Account

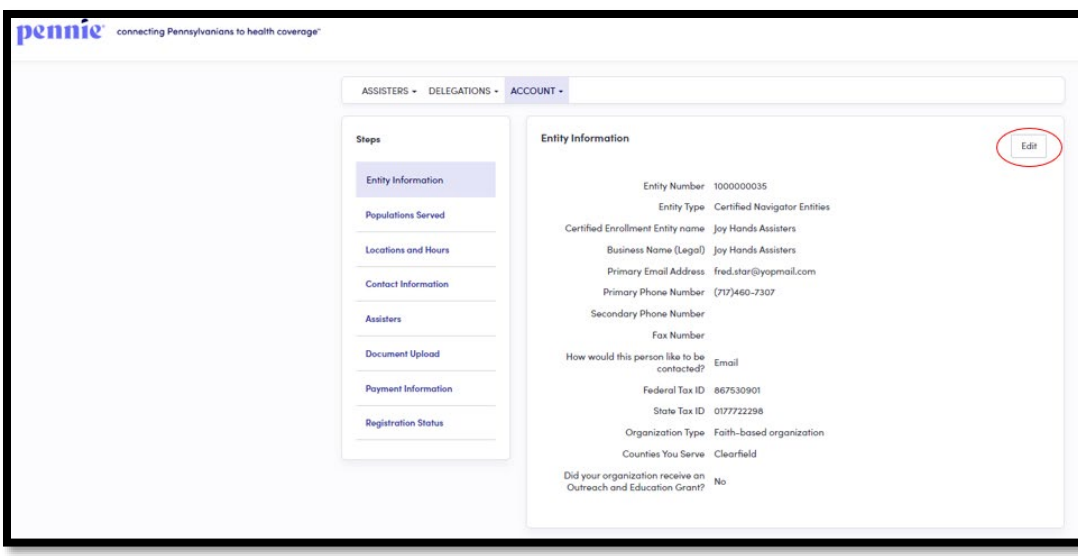
The Account section provides the Entity organization information that was entered while creating an Entity account. This section allows the Entity to update the Entity information, populations served, location and hours, contact information, add and update Certified Assister, and view current Entity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

5.1 Entity Information

5.1.1 Edit entity information

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

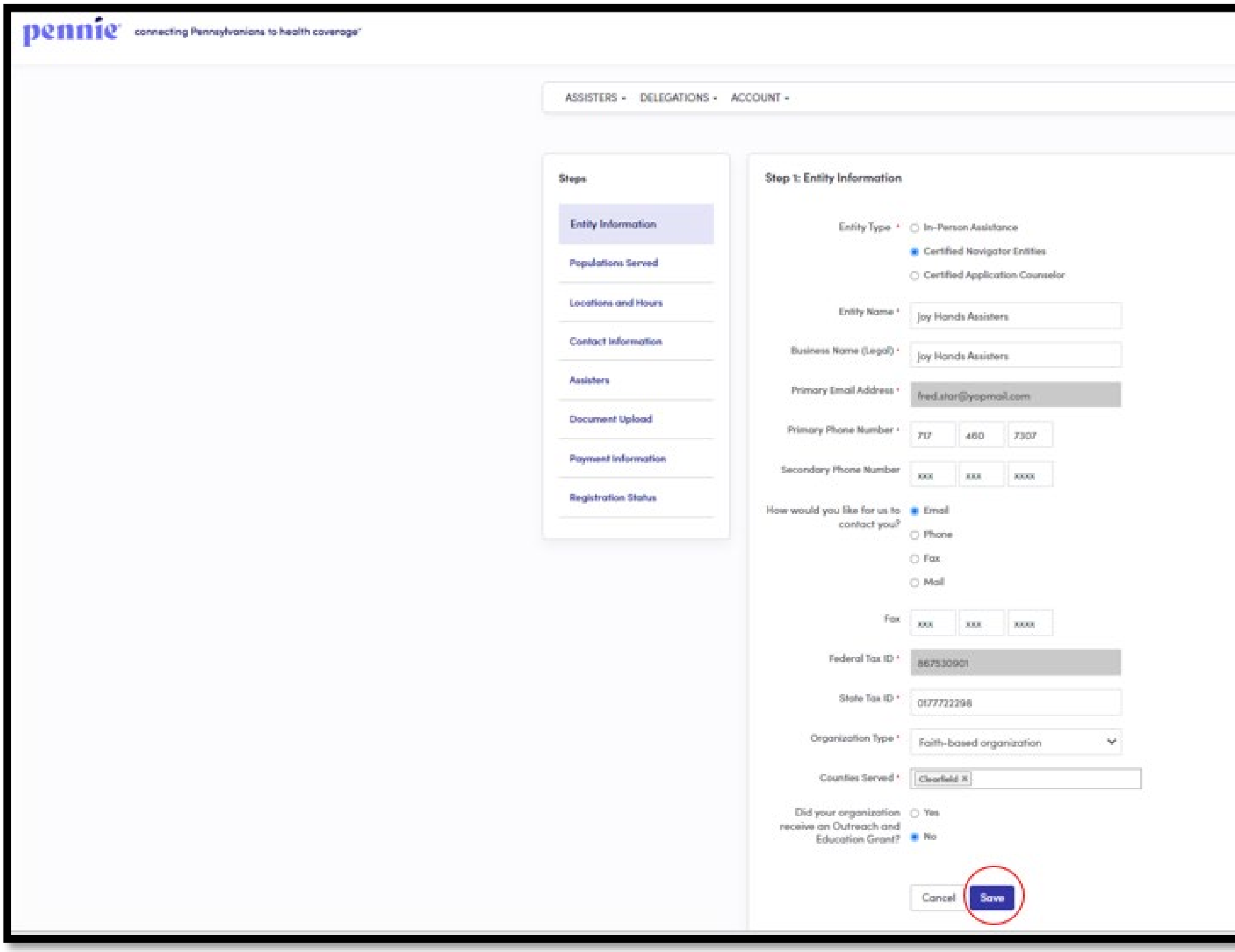
- Step-2: Go to "Entity Information" section and click on the 'Edit' button.



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

  <u>PLEASE NOTE:</u> 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

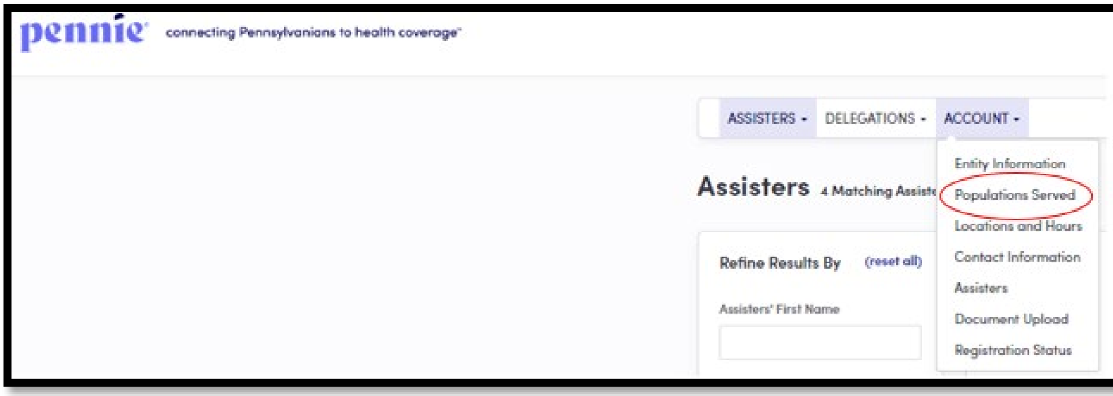
Entity Type is "In-person Assistance", Organization Type is "Private Partnership", and Did your organization receive an Outreach and Education Grant? is "No".



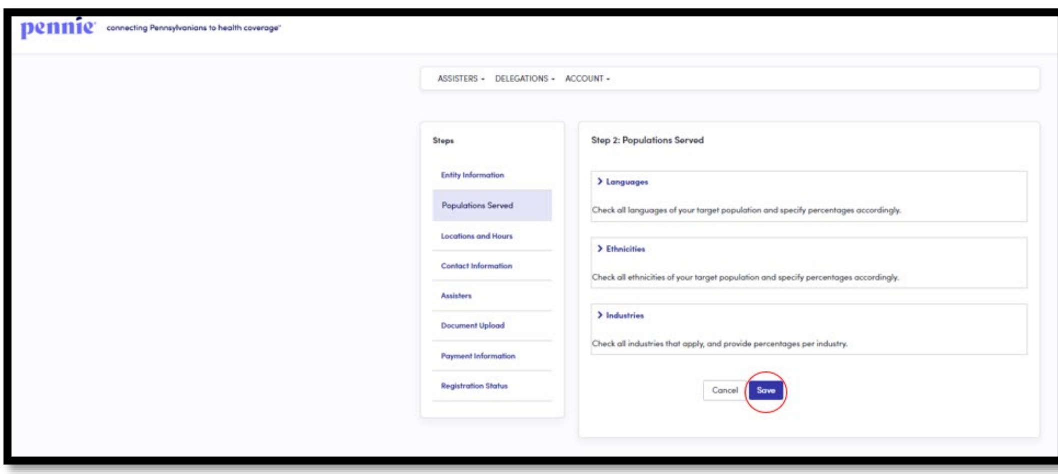
5.2 Populations Served

5.2.1 Edit populations served information

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



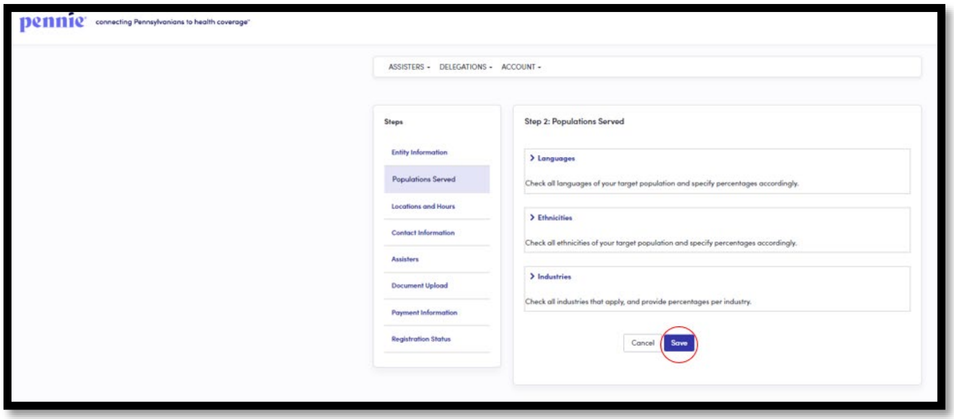
- Step-2: Click on the 'Edit' button.



- 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.

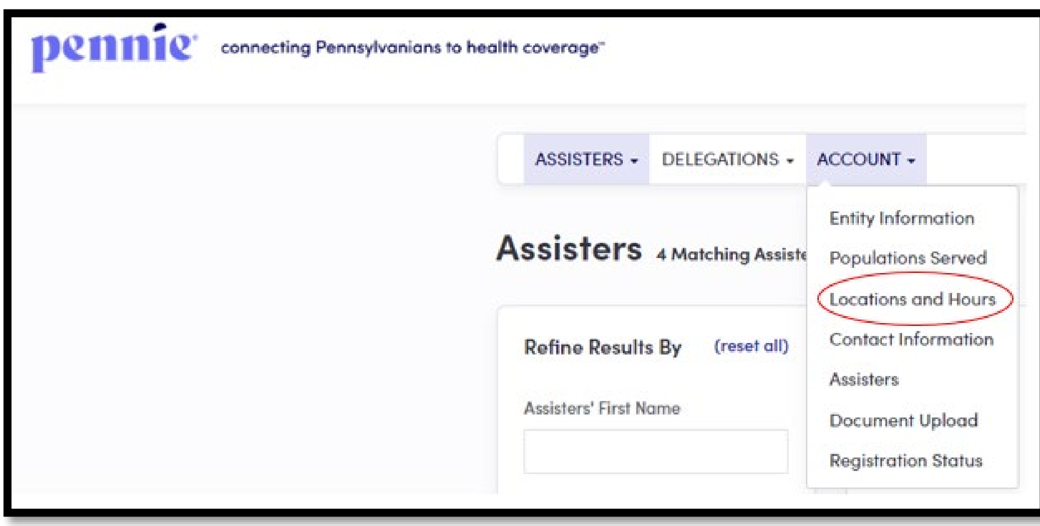
  PLEASE NOTE: The total "Estimated Percent" value in each section must add up to 100%.



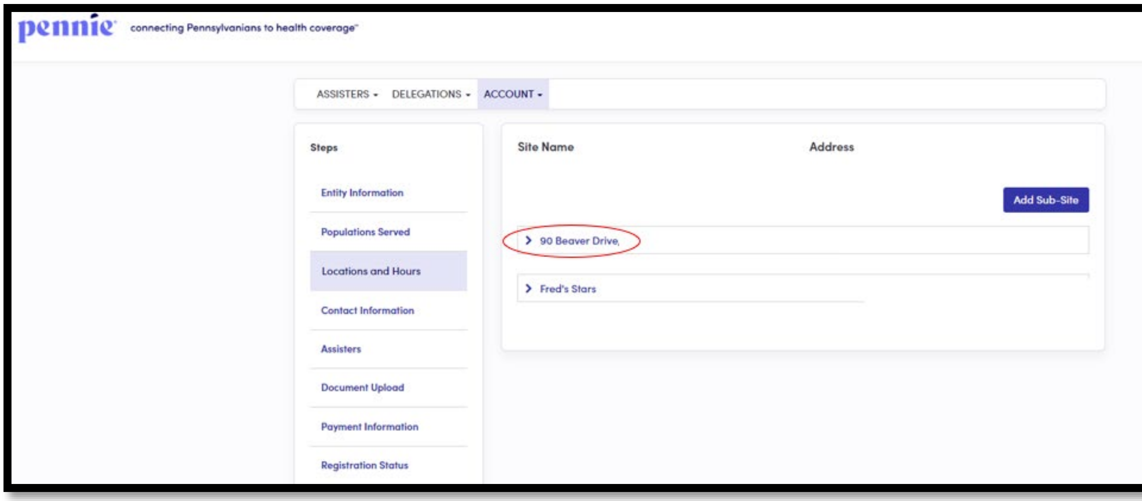
5.3 Location and Hours

5.3.1 Edit Primary Site information

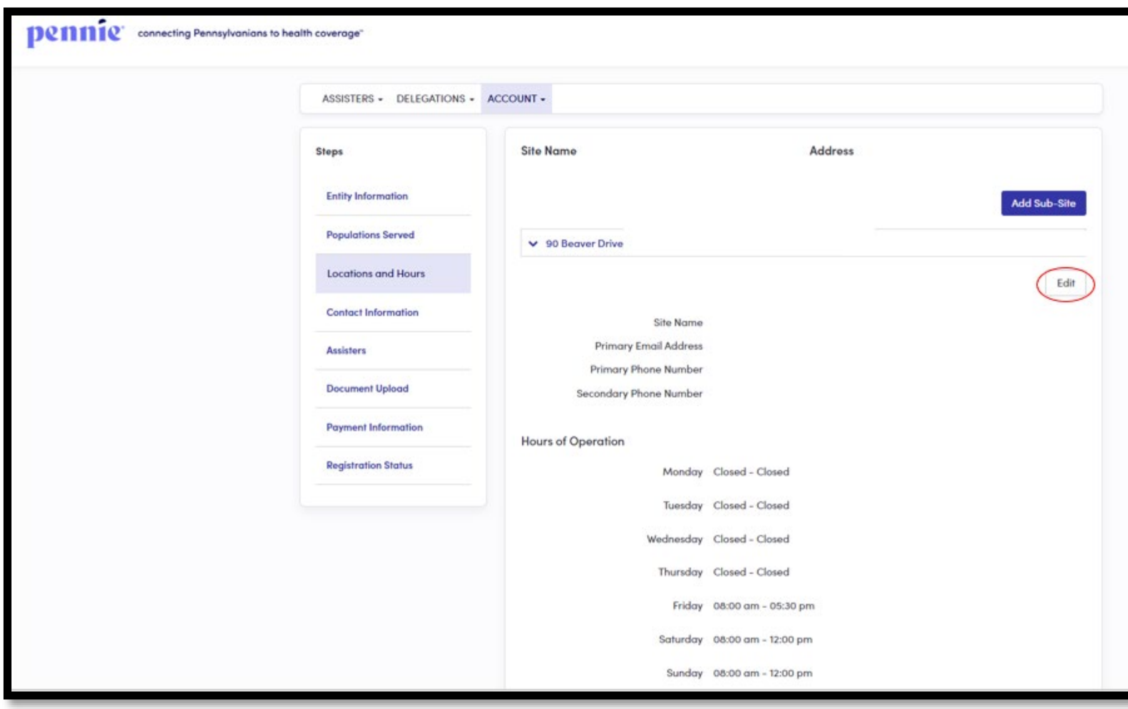
- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.



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



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

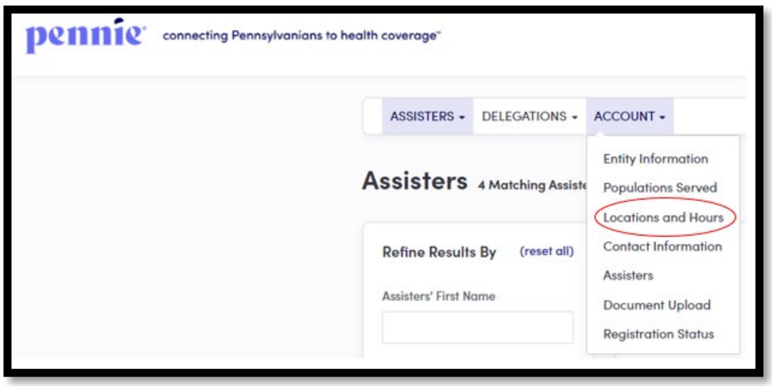


- Step-4: Update primary site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the 'Save' button.

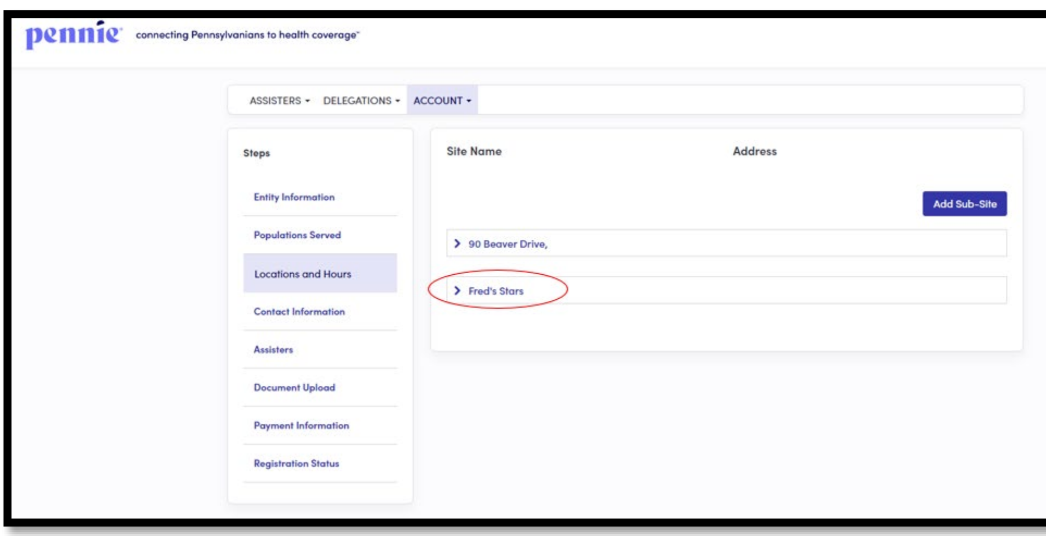
<u>PLEASE NOTE:</u> If you do not enter the physical address then the "Find Local Assistance" directory tool will not be able to provide geographic search results (i.e. by zip code and distance) for your location.

5.3.2 Edit Sub-Site information

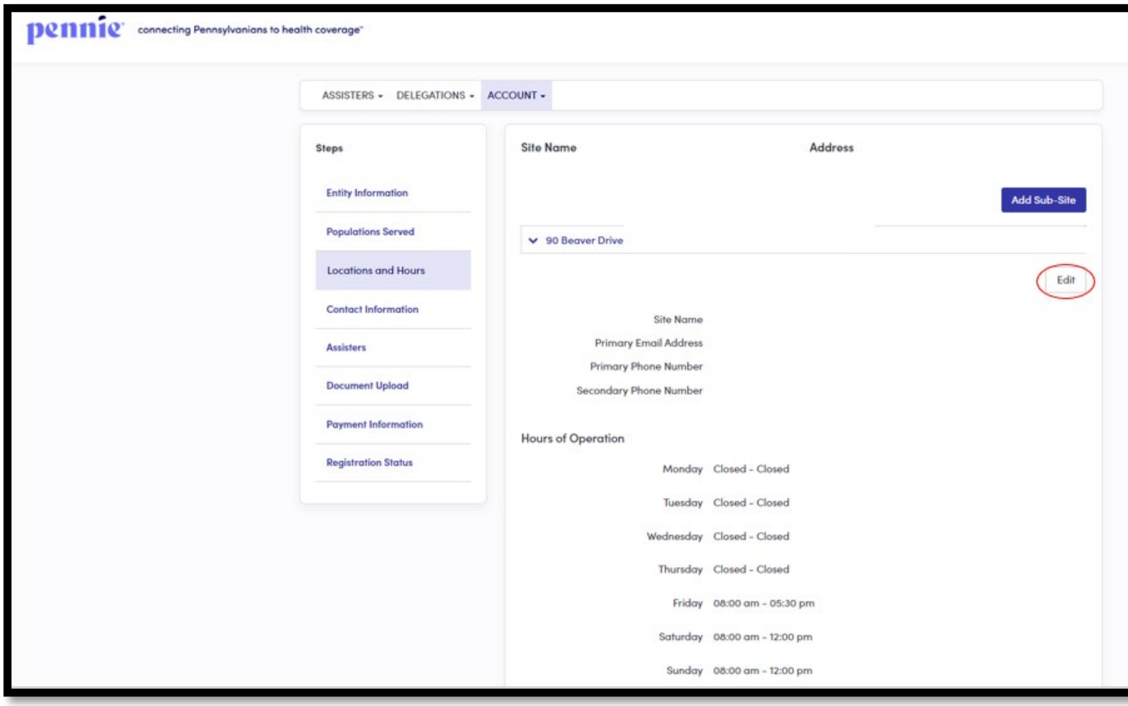
- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.



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



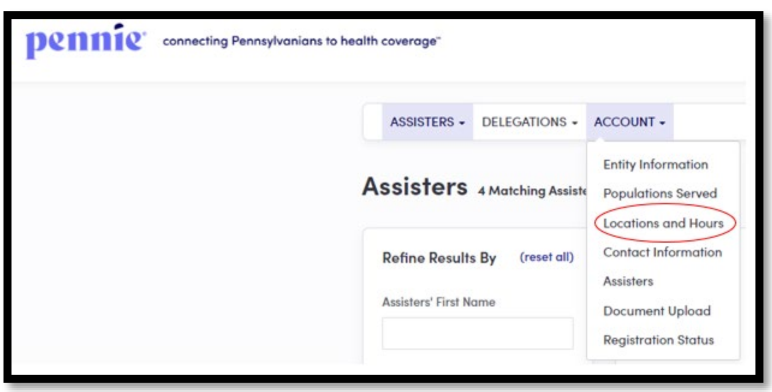
- Step-3: Click on the 'Edit' button.



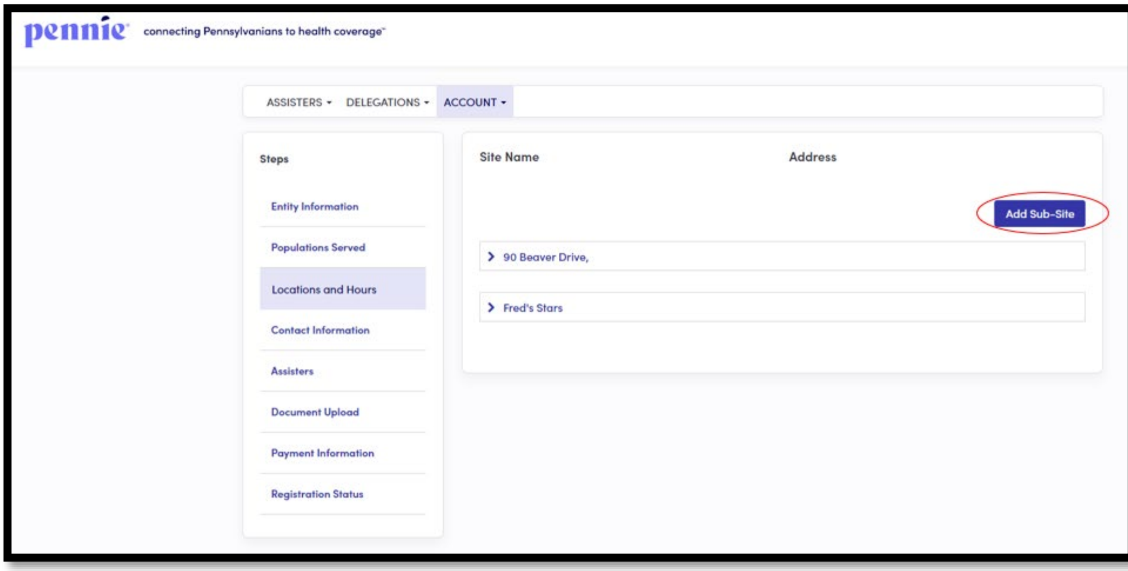
- Step-4: Update sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the 'Save Sub-Site' button.

5.3.3 Add sub-site information

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



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

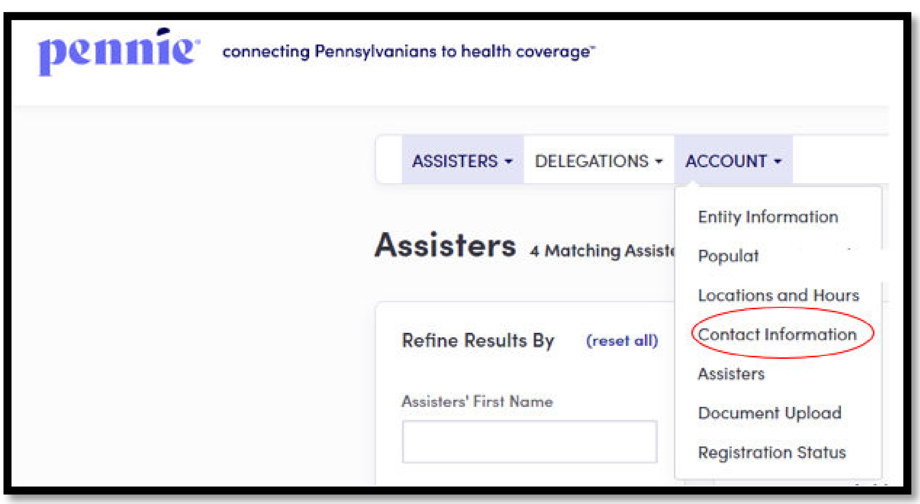


- Step-3: Enter sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the ‘Save Site’ button.

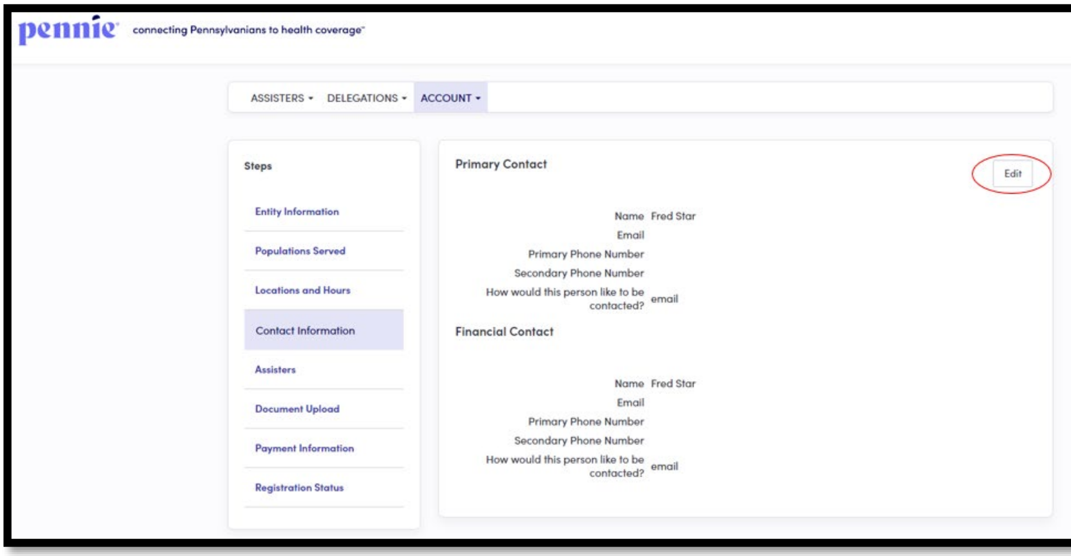
5.4 Contact Information

5.4.1 Add or update primary contact and financial contact information

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

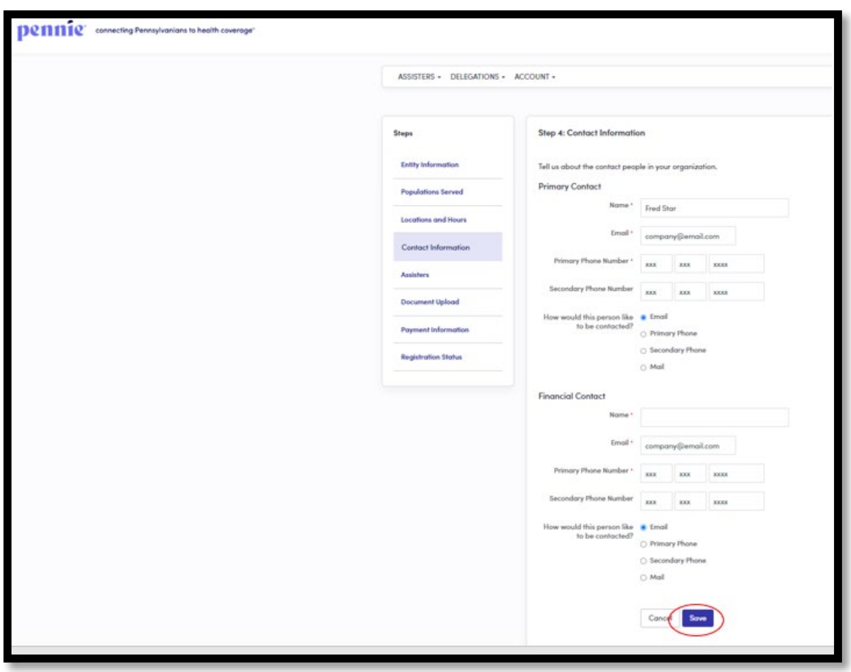


- Step-2: Click on the ‘Edit’ button.



- 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.



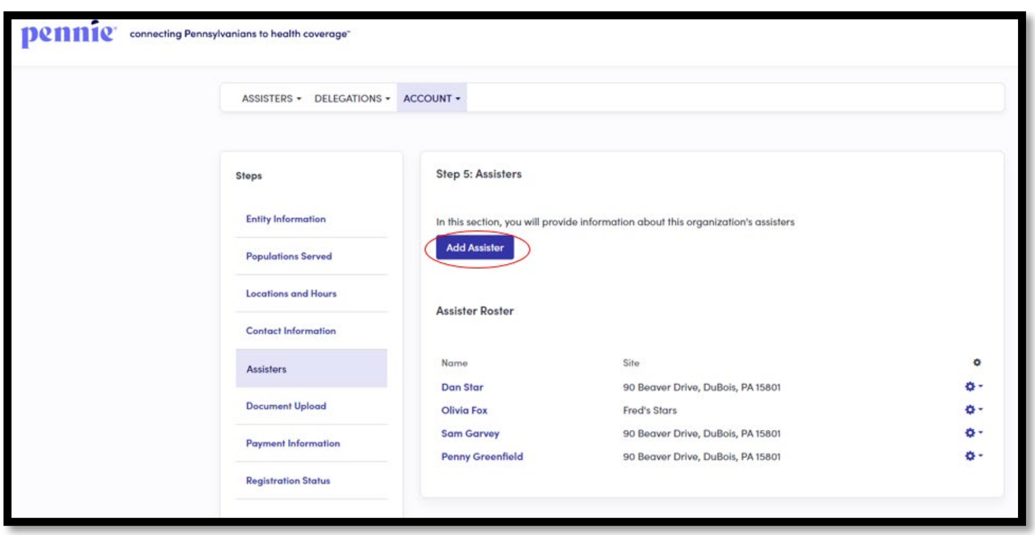
5.5 Assisters

5.5.1 Add an Assister

PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assisters 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'.

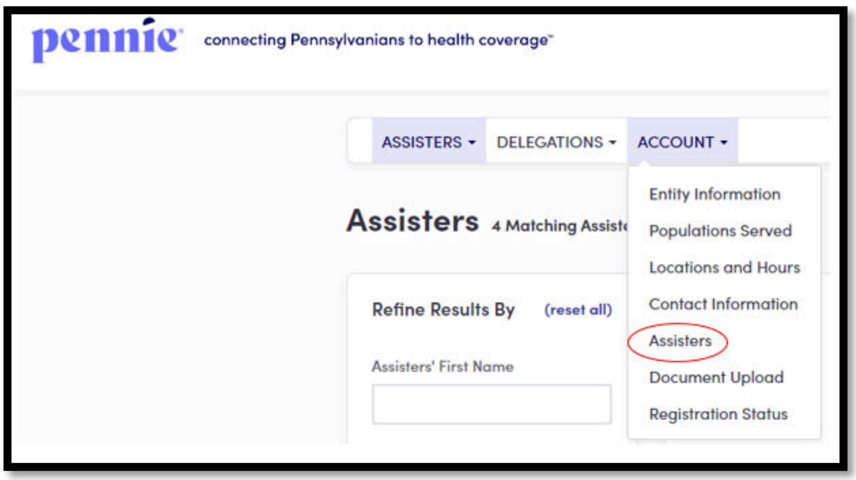
- Step-2: Click on the 'Add Assister' button.



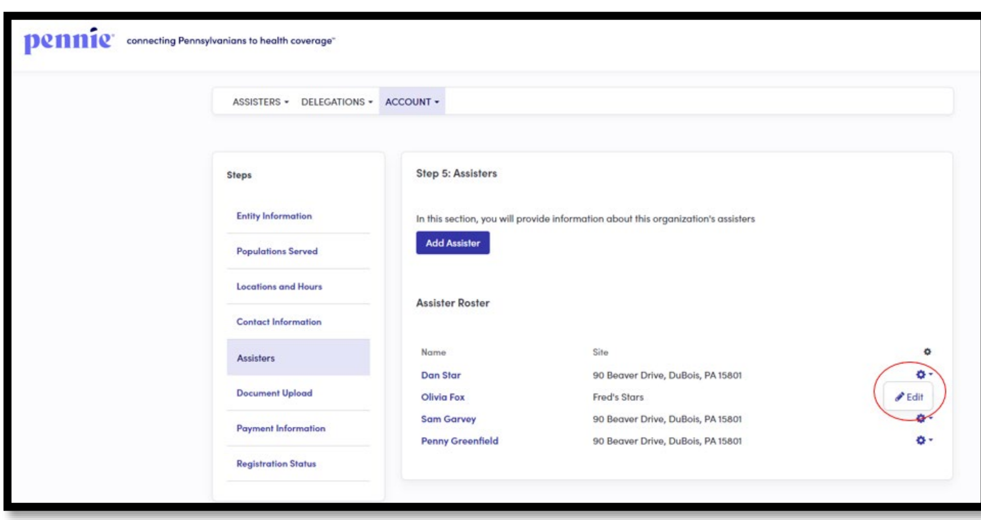
- Step-3: Fill out New Assister Form (for e.g., “First Name” or “Primary Phone Number”), enter the Mailing Address, Profile Information (For e.g., “Spoken Languages Supported” or “Written Languages Supported” or “Education”) and click on the ‘Save’ button.

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

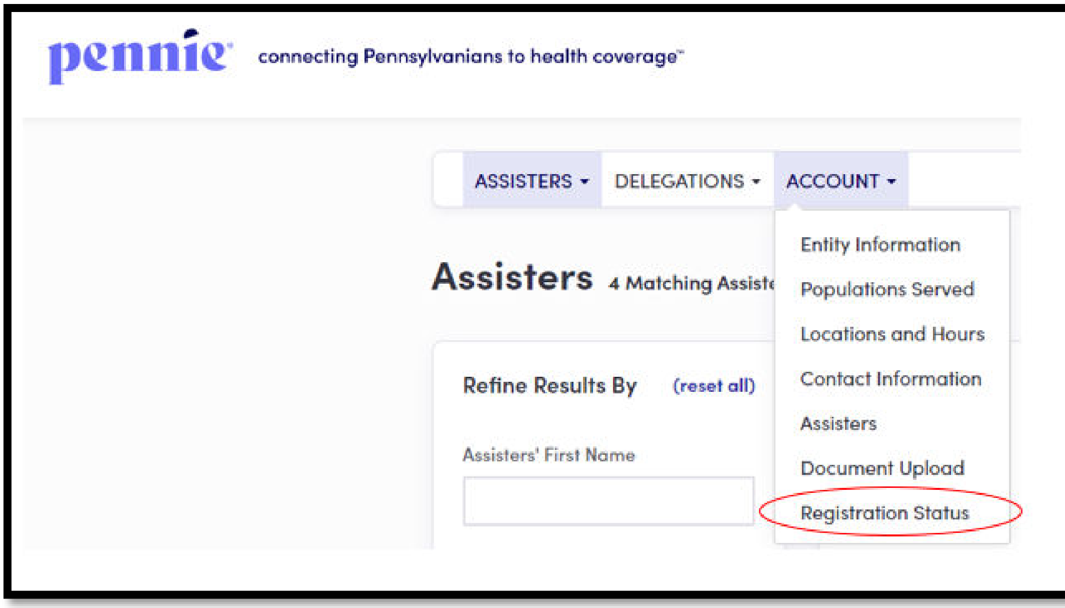
The Registration Status section provides a read-only listing to Entity organization’s registration status and registration history.

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

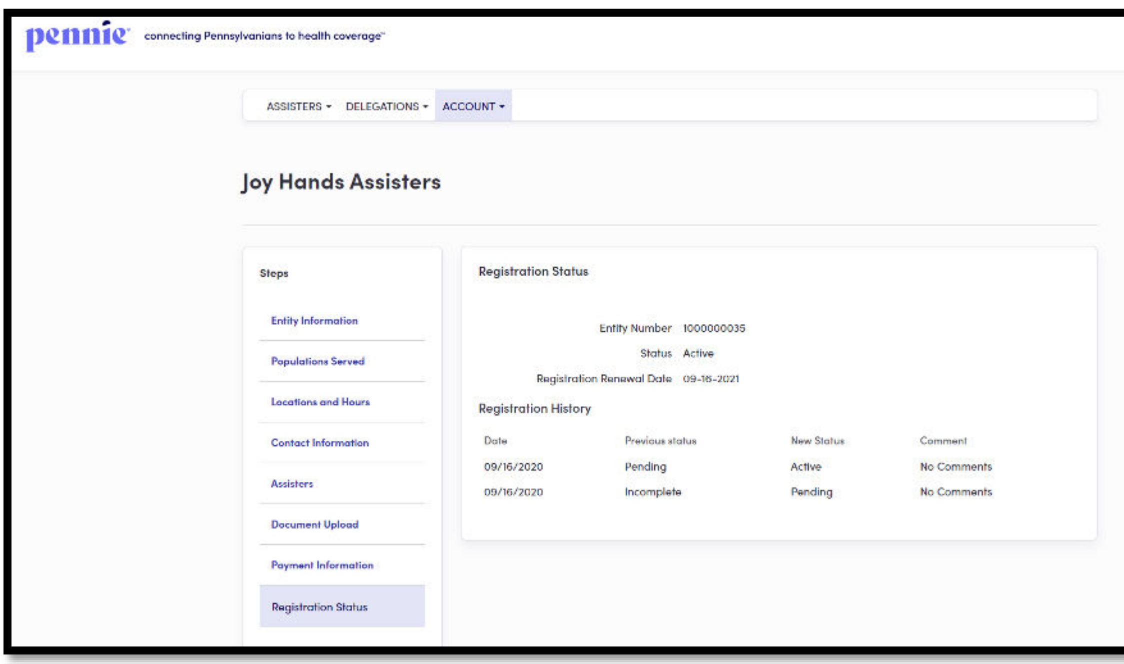
Pending
The Pending registration status is the default status assigned to a new Entity organization whose account has been created on the Pennie Platform and the Entity administrator (Admin) is reviewing their information.

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 Assisters 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